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(FILE 'USPAT' ENTERED AT 11:29:32 ON 31 AUG 1999)  
L1 18 S 705\*19/CCLS  
L2 0 S L1 AND(THIRD PART### OR INTERMEDIAR###) (P) (TAX  
PREPARER?  
)  
L3 29 S TAX PREPAR? AND(AUTOMAT? OR ELECTRON? OR  
COMPUTER?)  
L4 0 S TAX REPOT?(P) (PAYMENT#) (5A) (REFUND#)  
L5 0 S TAX REPORT?(P) (PAYMENT#) (5A) (REFUND#)  
L6 27 S (TAX REPORT?) AND(AUTOMAT? OR ELECTRON? OR  
REMOT? OR COM  
PUT  
L7 0 S TAX LIABILITY? PAYMENT  
L8 2033 S TAX AND(FIL### OR PREPAR? OR REPORT?)  
L9 1581 S L8 AND(AUTOMAT? OR ELECTRON? OR REMOT? OR  
COMPUTER)

=> s 5193057/pn

L7 1 5193057/PN

=> s 17 and(state? or local)

1018659 STATE?

154637 LOCAL

L8 1 L7 AND(STATE? OR LOCAL)

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US PAT NO: 5,193,057 [IMAGE AVAILABLE] L8: 1 of 1

SUMMARY:

BSUM(3)

In recent years, taxing authorities have increasingly automated the tax collecting and tax return filing process. In particular, the United States Internal Revenue Service has instituted a system for the electronic filing of tax return data. In conjunction with that system, the IRS has arranged to pay refunds by electronic funds transfer using the Treasury ACH origination system. While this has greatly improved the tax filing and refund process it still requires a period of three to six weeks from the filing of an individual's tax return to the time of receipt of a refund check.

SUMMARY:

BSUM(6)

The present invention is a unique combination of data processing programs resulting in a data processing system that provides a tax refund payment within 24-48 hours from the time of filing a tax return. In the present embodiment an Electronic Filing Program prepares a 1040, 1040A or 1040EZ federal tax return acceptable for electronic transmission to the United States Internal Revenue Service, on the basis of tax filer

provided data. At the same time, the tax filer applies for a refund loan and, on the basis of filer provided credit data, a deposit/loan account is opened at a authorized financial institution. In a preferred use of the system of the invention, the entire transaction takes place at the offices of an authorized tax return preparer. Such a use of the system provides the tax filer with the benefit of having a tax return prepared and filed on one day and picking up a check at the same office for any refund due, less tax preparation fees and filing fees, on the next day; all without an out of pocket payment by the tax filer.

DETDESC:

DETD(3)

Once data input is complete, a program process is executed by a data processing means to create electronic tax return files 20 which are in a form accepted by the taxing authority processing the taxpayer tax return. In the present embodiment a program flow chart of an Electronic Filing Program for preparing 1040, 1040A and 1040EZ tax returns in electronic format acceptable to the United **States** Internal Revenue Service comprises Microfiche Appendix I hereto. It is also necessary to validate tax return data and loan application data as is shown in block 30. validation of tax return data including mathematical checking is performed by the Electronic Filing Program of Microfiche Appendix I. In addition, individual identification data is compared to a file containing credit information to identify individuals with unacceptable credit histories.

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L11            21269 TELECOMMUNIC?  
              1 L7 AND TELECOMMUNIC?

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US PAT NO:     5,193,057 [IMAGE AVAILABLE]            L11: 1 of 1

DETDESC:

DETD(15)

After all required tax returns have been entered the preparer can transmit the returns to the remote processing center. This is accomplished by selecting the 'NEW TRANSMISSION FILE' entry from the main screen. When this item is selected the transmit screen is displayed, the preparer indicates the returns to be transmitted by changing the status code on the transmit screen to 'T'. The system then adds these tax returns to the transmit file, dials the remote processor center number, and transmits the data over either dedicated or ordinary **telecommunication** lines.

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L14            442781 STORAG?  
              1 L7 AND STORAG?

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US PAT NO:      5,193,057 [IMAGE AVAILABLE]            L14: 1 of 1

DETDESC:

DETD(2)

Referring now to FIG. 1 here shown in schematic flow diagram form overall depiction of the data processing functions for implementing the invention. Input means 10 is used for inputting tax taxpayer identification, taxpayer tax return information and refund anticipation load information. In preferred embodiment input means 10 comprises and intelligent terminal such as a personal computer having programmable data processing arithmetic and logical functions a keyboard visual monitor data **storage** and data transmission capabilities. Data input using such an input means is hereinafter described in more detail.

CLAIMS:

CLMS(2)

2. The electronic data processing system of claim 1 wherein said input means includes keyboard input means, visual monitor means, data **storage** means, data transmission means and programmable data processing means for executing said program means for processing said tax preparer data and said tax return data and transmitting said electronic tax return data files and said payment data, to a remote processing center.

US PAT NO: 5,193,057 [IMAGE AVAILABLE] L4: 14 of  
17

TITLE: **Electronic income tax refund early payment**  
system with means for creating of a new deposit  
account

for receipt of an **electronically transferred**  
**refund** from the IRS

US-CL-CURRENT: 705/31, 39

ABSTRACT:

**Electronic** data processing system for preparation of **electronically filed tax** returns and authorization and **payment of refunds** based on the data supplied in those returns. **Electronic** data processing programs are provided for creating an electronic tax return that is filed with a tax collecting authority. At the same time as the electronic tax return is created, a loan application is processed to create an electronic deposit/loan account for the tax filer at an authorized credit institution. As early as the day after completion of the tax return and loan application, the tax filer receives initial refund payment from the loan account. The authorized credit institution electronically files the electronic tax return with the tax collecting authority which processes the return and transfers by electronic fund transfer the refund amount to the deposit/loan account at the authorized credit institution. Any refund in excess of the initial refund payment is then forwarded to the tax filer. Provision is also made for checking the credit worthiness of the tax filer.

SUMMARY:

BSUM(2)

This invention relates to a data processing system for use on programmable data processing machines. More particularly, the invention comprises a data processing program for the preparation of **tax** returns, for **electronic** filing thereof with a taxing authority and data processing programs for creating a deposit/loan account at an authorized financial institution for providing immediate **payment** of **tax refunds** based on such prepared and filed returns. The

deposit/loan account is created with the capability of receiving electronic fund transfer deposits directly from the taxing authority.

SUMMARY:

BSUM(3)

In recent years, taxing authorities have increasingly automated the tax collecting and tax return filing process. In particular, the United States Internal Revenue Service has instituted a system for the electronic filing of tax return data. In conjunction with that system, the IRS has arranged to pay refunds by electronic funds transfer using the Treasury ACH origination system. While this has greatly improved the tax filing and refund process it still requires a period of three to six weeks from the filing of an individual's tax return to the time of receipt of a refund check.

SUMMARY:

BSUM(4)

In contrast, the system of the invention shortens the time from filing to receipt of a refund to as little as one day. Additional advantages and features of the instant invention will become more readily apparent from the following detailed description of a specific illustrative embodiment thereof presented hereinbelow in conjunction with the accompanying drawing and appendices.

SUMMARY:

BSUM(6)

The present invention is a unique combination of data processing programs resulting in a data processing system that provides a tax refund payment within 24-48 hours from the time of filing a tax return. In the present embodiment an Electronic Filing Program prepares a 1040, 1040A or 1040EZ federal tax return acceptable for electronic transmission to the United States Internal Revenue Service, on the basis of tax filer provided data. At the same time, the tax filer applies for a refund loan and, on the basis of filer provided credit data, a deposit/loan account is opened at a authorized financial institution. In a preferred use of the system of the

invention, the entire transaction takes place at the offices of an authorized **tax** return preparer. Such a use of the system provides the **tax** filer with the benefit of having a **tax** return prepared and filed on one day and picking up a check at the same office for any **refund** due, less **tax** preparation fees and filing fees, on the next day; all without an out of pocket **payment** by the **tax** filer.

SUMMARY:

BSUM(7)

The specific embodiment of the data processing system of the invention is disclosed in the form of program flow charts enabling a skilled programmer to write programs in any of a variety of **computer** programming languages (e.g., COBOL) which can be executed on any of a number of data processing machines. It is also anticipated that programs equivalent to the disclosed programs can be written by those skilled in the art to achieve the unique benefits of the data processing system of the invention.

DETDESC:

DETD(2)

Referring now to FIG. 1 here shown in schematic flow diagram form overall depiction of the data processing functions for implementing the invention. Input means 10 is used for inputting **tax** taxpayer identification, taxpayer **tax** return information and **refund** anticipation load information. In preferred embodiment input means 10 comprises an intelligent terminal such as a personal **computer** having programmable data processing arithmetic and logical functions a keyboard visual monitor data storage and data transmission capabilities. Data input using such an input means is hereinafter described in more detail.

DETDESC:

DETD(3)

Once data input is complete, a program process is executed by a data

processing means to create **electronic tax** return files 20 which are in a form accepted by the taxing authority processing the taxpayer

**tax** return. In the present embodiment a program flow chart of an **Electronic Filing Program** for preparing 1040, 1040A and 1040EZ **tax** returns in **electronic** format acceptable to the United States Internal Revenue Service comprises Microfiche Appendix I hereto. It is

also necessary to validate **tax** return data and loan application data

as is shown in block 30. Validation of **tax** return data including mathematical checking is performed by the **Electronic Filing Program**

of Microfiche Appendix I. In addition, individual identification data is

compared to a file containing credit information to identify individuals

with unacceptable credit histories.

DETDESC:

DETD(4)

When validation is complete, a deposit/loan account 40 is created at a authorized financial institution, e.g., bank, financial union, Savings

and Loan Association, etc., that issues advance **payments** of **taxpayer**

**refunds**. To accomplish this in the present embodiment the authorized

financial institution programs a data processor means in accordance with

the program flow chart of Microfiche Appendix II which is more fully

described hereinafter.

DETDESC:

DETD(5)

After creation of the deposit/loan account file 40, the **tax** return

data is electronically filed with the taxing authority as indicated

in block 50. In the present embodiment, the taxing authority is the IRS

and the **tax** preparer and return data is supplied via **electronic** transmission to designated IRS **computers**. This data also includes identification of the deposit/loan account which is designated to receive

**electronic** fund transfer **refunds** directly from the IRS through

the Treasury Department's ACH system.

DETDESC:

DETD(6)

As soon as the validated **tax** return data and loan application data have been processed and a **refund** amount is determined, the **refund** loan **payment** procedure 60 is initiated. The payor authorized financial institution may have set a maximum amount (Rmax), for example \$2,500, which it will immediately pay out as a **refund** loan. Therefore a determination is made as to whether or not the claimed **refund** exceeds this amount. If that is the case, excess **refund** processing is entered and an excess **refund payment** 80 is generated when the **electronic** funds **payment** is received. Simultaneously, the maximum authorized amount of **refund** anticipation loan is processed by determining whether or not **payment** is to be made through an authorized preparer 90 or directly by the authorized financial institution 100. In the case of an authorized preparer a financial institution check is issued by the preparer for delivery the next day. In the case of direct **payment** by the authorized financial institution, a check is mailed to the **tax** filer the next day. The foregoing constitutes an overall description of the data processing system of the invention.

DETDESC:

DETD(7)

Returning now to the **Electronic** Filing Program 20 of the present embodiment which is set forth in the program flow charts of Microfiche

Appendix I. The **Electronic** Filing Program (EFP) is designed to be used by **tax** preparers having an intelligent terminal input means 10.

The program enables preparers 20 to **electronically** enter **tax** returns and transmit them to a **remote** processing center. The **remote** processing center gathers **tax** returns from many **tax** preparers and collectively transmits them to the IRS. The System Specifications of the EFP are divided into four main sections these sections describe the **tax** preparers duties and systems operations as they pertain to 1. SYSTEM INITIALIZATION, 2. DATA ENTRY, 3. TRANSMIT, and 4. FOLLOW-UP.

DETDESC:

DETD(8)

The system initialization process is designed to make it as easy as possible for the **tax** preparer. It sets up all the files required by the EFP software, and guides him through the terminal screen provided for the entry of the **tax** preparer information (Microfiche Appendix I).

The system is designed for the entry of the **tax** preparer information separately so that it needs only be entered once, but provides the **tax** preparer the opportunity to change this information if needed. In the present embodiment, such **tax** preparer data is in the form required by the IRS for preparers eligible to file **tax** return data **electronically**.

DETDESC:

DETD(9)

The **tax** preparer gathers all the necessary information from a client to file a **tax** return. The EFP can handle the three basic **tax** returns, 1040, 1040A, and 1040EZ and certain supported schedules and forms. The **tax** preparer then goes to his intelligent terminal and enables the EFP program.

DETDESC:

DETD(10)

After the preparer has completed the 1040, 1040A or 1040EZ form by following the input procedures, the EFP software performs two major functions. First, it determines the presence of errors in the entry of most of the major fields. Second, it determines from the information entered on the 1040 if any of the supported forms or schedules are required. If any of the supported forms or schedules are required it **automatically** brings to the screen the required data entry format for

completion by the preparer.

DETDESC:

DETD(11)

After the preparer has entered all of the information for the 1040, 1040A, or 1040EZ, and all related forms and schedules, the software **automatically** displays a summary screen.

DETDESC:

DETD(12)

The preparer then enters his code on the summary screen and the system **automatically** displays all of the information from the preparer file.

The information on the preparer file is entered only once and can be updated as needed by using option seven from the main menu. It is attached to each **tax** return through the summary screen. The summary screen also provides for the input of authorized financial institution route information and displays a list of the required documents.

DETDESC:

DETD(14)

When all of the required W-2's have been completed the software **automatically** returns to the main screen. At this time the preparer can either enter another 1040, 1040A, or 1040EZ, or select which returns are to be transmitted to the **remote** processing center.

DETDESC:

DETD(15)

After all required **tax** returns have been entered the preparer can transmit the returns to the **remote** processing center. This is accomplished by selecting the 'NEW TRANSMISSION FILE' entry from the main screen. When this item is selected the transmit screen is displayed, the preparer indicates the returns to be transmitted by changing the status code on the transmit screen to 'T'. The system then adds these **tax**

returns to the transmit file, dials the **remote** processor center number, and transmits the data over either [REDACTED] or ordinary telecommunication lines.

DETDESC:

DETD(16)

The week after a **tax** return has been accepted by the IRS, the preparer must ship a form 8453 and supporting documents such as W2's to the IRS. IRS rejected returns are corrected by the central processing center unless the **tax** meaning of the return would be altered, in which case the preparer is informed and asked to re-process the return.

DETDESC:

DETD(17)

In the present embodiment the validation 30, account file creation 40 **electronic** filing 50, and **refund payment** processing 60, 70, 80, 90 and 100 are all performed at the **remote** processing center. These functions are performed by data processing programs created in accordance with appendix II hereto. In overview this embodiment of the system of the invention permits a taxpayer to obtain a **refund** loan within one or two days of filing his **tax** return through an authorized preparer directly or by mail from the participating authorized financial institution. This is in contrast to the typical 6 to 8 weeks required to receive a **refund** directly from the IRS. Rapid **refund payment** is accomplished by the authorized financial institution issuing to the **tax** filer a demand loan for an amount of the **tax** filer's calculated IRS **refund**. This loan is in the form of a check issued by the authorized financial institution and has the loan terms on the check document. A deposit account is opened for the customer at the authorized financial institution to which the **tax** filer's IRS **tax refund** is sent via the IRS **electronic** funds transfer ACH system. This IRS **refund payment**, when received is **automatically** applied as **payment** of the **tax** filer's loan, paying it off, assuming that none of the **refund** was withheld by the IRS. In the event that a cap

has been set by the lender, any **refund** in excess of the amount of the  
loan is subsequently issued in an additional check for that excess amount  
and mailed to the **tax** filer. To accomplish this in the **Refund** Anticipated Loan (RAL) system of the embodiment of Microfiche Appendix II,, an issue file will be transmitted from the **remote** processing center. Multiple files are allowed on a daily basis. This file will be posted to a masterfile on the authorized financial institution data processing means, in this instance an NCR 8250. Validation will be performed on the file received from the **remote** processing center. Fields validated include the Social Security Number field for numerics and non duplicate Social Security Number, the amount file for numerics and the Name and Address filed for Alpha/Numerics. The individual items and amounts are summed up and compared against the trailer record for control. The loan application is also compared to a master credit data file to validate the credit worthiness of the applicant **tax** filer. A failure of this test will result in an error return to the originating **tax** preparer the next day. The RAL **refund** checks are generated from the file transmission and update. The checks are mailed within 24 hours from receipt of file from the authorized financial institution or in the case of authorized preparers will be issued the next day by the preparer. Four reports are generated by this program. They are the input Validation, Update Report, RAL Checks, and Check Register.

DETDESC:

DETD(18)

Each day three reconciliations are performed against the RAL Masterfile. One is for the clearing of the cashed RAL checks. The information from all captured bank checks is searched and RAL **refund** check information extracted. This is posted against the RAL Masterfile. The checks are matched by serial number to the RAL Masterfiles Serial Number to insure

that the amount cleared equals the amount issued. All exceptions are noted as an exception for manual exception item handling. All validated checks are posted against the RAL Masterfile, and the date cleared is stored.

DETDESC:

DETD(19)

A second reconciliation is performed daily. This is a reconciliation against all incoming IRS ACH items. The IRS ACH Incoming file is searched for RAL IRS **Tax Refunds**. This is keyed off of the account number field in the IRS ACH record. A unique constant eight digit number followed by the **tax** filer's Social Security number is used in the Account Number field for the IRS ACH **Refund**. Based upon this unique number, the IRS ACH items are searched and information pulled for validation and update to the RAL Masterfiles. Four reports are generated. They are the IRS ACH RAL Validation Report, the Update Report, Excess **Refund** Checks, and Excess **Refund** Check Register. These Excess **Refund** Check Issues are posted to another reconciliation masterfile.

DETDESC:

DETD(20)

A third reconciliation is made for the Excess **Refund** Checks. This is a basic reconciliation system. Each day all data from the captured checks is searched and Excess **Refund** check information is extracted to post against the Excess **Refund** reconciliation Masterfile. Again two reports are generated, one is a Validation Report and the second an Update Report.

DETDESC:

DETD(21)

On a periodic basis, a program is run to strip off from the RAL Masterfile and Excess RAL **Refund** Masterfile, all completely cleared items to a history file.

CLAIMS:

CLMS (1)

What is claimed is:

1. An **electronic** data processing system for **electronic** filing of income **tax** returns and authorizing **tax refund payments** comprising:
  - a) at least one programmable **electronic** data processing means for executing programmed arithmetic and logical processes and storing data;
  - b) at least one input means for inputting **tax** preparer data, **tax** return data and **tax refund payment** data to said at least one data processing means;
  - c) program means executable by said at least one data processing means for processing said **tax** preparer data and said **tax** return data and creating **electronic tax** return data files;
  - d) program means executable by said at least one data processing means for processing **tax refund payment** data and creating **electronic** deposit account files at an authorized financial institution;
  - e) program means executable by said at least one data processing means for processing said **tax** return data files and said **electronic** deposit account files and for transmitting **electronic tax** return data to at least one **electronic** data processing means controlled by at least one **tax** collecting authority and designating said **electronic** deposit account file at the authorized financial institution as the recipient of **electronic** funds transfer data from at least one **electronic** data processing means controlled by at least one **tax** collecting authority;
  - f) program means executable by said at least one data processing means for processing said **tax** return data files and said **electronic** deposit account files and authorizing **payment** by said financial institution of a **tax refund** amount from said deposit account upon **electronic** funds transfer of the **refund payment** by said **tax** collection authority; and
  - g) program means executable by said at least one data processing means for **electronically** closing said **electronic** deposit account file after **payment** of the **tax refund** amount to the taxpayer.

CLAIMS:

CLMS (2)

2. The **electronic** data processing system of claim 1 wherein said input means includes keyboard input means, visual monitor means, data storage means, data transmission means and programmable data processing means for executing said program means for processing said **tax** preparer data and said **tax** return data and transmitting said **electronic tax** return data files and said **payment** data, to a **remote** processing center.

CLAIMS:

CLMS (3)

3. The **electronic** data processing system of claim 2 wherein said **remote** processing center includes at least one programmable data processing means for executing said program means for processing **payment** data and creating **electronic** deposit account files, for transmitting **electronic tax** return data to and for authorizing receipt of by said authorized financial institution **electronic** funds transfer data from, at least one **electronic** data processing means controlled by at least one **tax** collecting authority and for executing said program means for processing said **tax** return data files and said **electronic** deposit account files and program means for transmitting said files to said authorized financial institution for authorizing **payment** of a **tax refund** amount from said **electronic** deposit account whereby said **payment** made be made at a **tax** preparer site upon **tax** return processing and **electronic** funds transfer **refund payment** by said **tax** collecting authority.

CLAIMS:

CLMS (4)

4. The **electronic** data processing system of claim 1 further including program means for deducting processing fees from said **refund** amount and program means for transmitting at least a part of said fees by **electronic** funds transfer.

CLAIMS:

CLMS (5)

5. The method of claim 1 further comprising the steps of deducting processing fees from said **refund** amount and transmitting at least part of said fees by **electronic** funds transfer.

File 485:Accounting & Tax DB 1971-2002/Jan W1  
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Set Items Description  
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**00193499/9**

DIALOG(R) File 485:Accounting & Tax DB  
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00193499

**Filing Government Statements Electronically**

Harper, Robert M., Jr.; Hoffman, Michael J. R.

Journal of Accounting & EDP v2 n2 PP: 52-56 Summer 1986

ISSN: 8756-5714 JRNL CODE: JAD

DOC TYPE: Journal article

LANGUAGE: English SPECIAL FEATURE: References CODEN: DCAC

ABSTRACT: Many government agencies have taken steps toward greater usage of electronic data processing in the filing process for information returns. Internal Revenue Code (IRC) Section 6011 permits filing 1099s as well as Employers' Quarterly Tax Returns. The possibility of filing income tax returns electronically is being explored by the Internal Revenue Service (IRS). A pilot project for electronic filing is under way. The Securities & Exchange Commission (SEC) also has a voluntary pilot project for the Electronic Data Gathering Analysis and Retrieval (EDGAR) system. EDGAR provides benefits for the SEC, corporations, and investors. While these prospects for filing electronically are promising, it will take the next several years for pilot projects to be completed and general usage authorized. In anticipation of this, accountants should ensure that the software in use is capable of electronic filing.

COMPANY NAMES:

SEC

Internal Revenue Service

DESCRIPTORS: Machine readable; Filing; Electronic; Taxpayers; Government agencies; Automation; Tax returns; Information retrieval; Case studies

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Set	Items	Description
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**00209996/9**

DIALOG(R)File 485:Accounting & Tax DB  
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00209996

**Computers and the Tax Professional**

Throneberry, Mary Beth; Malley, John C.; Wallace, William D.  
National Public Accountant v32 n5 PP: 20-24 May 1987

ISSN: 0027-9978 JRNL CODE: NPA

DOC TYPE: Journal article

LANGUAGE: English SPECIAL FEATURE: Charts References CODEN: DCAC

**ABSTRACT:** As microcomputer processing of income tax returns replaces batch processing and timesharing, tax accountants face new responsibilities and decisions. The method of gathering clients' tax data must be selected -- either input sheets, interview sheets, proforma sheets, direct computer input, or computerized communications links. When selecting hardware, the tax professional may want to purchase a less expensive microcomputer that can be upgraded later. When selecting software, the tax professional should consider the cost, the compatibility with hardware, and whether to purchase or develop the software in-house. To avoid delays in return processing by the Internal Revenue Service, the system's output must be correct. The Internal Revenue Code now provides guidance for tax preparers who use computers. Microcomputers also can be used for tax research, tax planning, and database retrieval. In a recent questionnaire, tax preparers indicated that microcomputers provided significant savings in cost and time.

**DESCRIPTORS:** Accountants; Accounting firms; Automated accounting systems; Tax returns; Tax preparation; Equipment acquisition planning; Decision making; Professional responsibilities

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**00379603/9**

DIALOG(R)File 233:Internet & Personal Comp. Abs.  
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00379603 95CZ03-040

**Make April 15 less taxing -- TurboTax finds deductions even accountants miss**

Middleton, Timothy  
Computer Life , March 1, 1995 , v2 n3 p159-162, 3 Page(s)  
ISSN: 1076-9862  
Company Name: Intuit  
Product Name: TurboTax; MacInTax  
Languages: English  
Document Type: Software Review  
Grade (of Product Reviewed): B  
Hardware/Software Compatibility: IBM PC Compatible; Macintosh; CD-ROM

Drive

Geographic Location: United States

Presents a favorable review of TurboTax (\$69 Windows and DOS floppy disk; \$70 Windows CD-ROM; \$69 as MacInTax on floppy disk for Macintosh), tax preparation software from Intuit (800, 602). Says that TurboTax supports data importation from personal finance software and provides an illuminating information-gathering interview. The program also calculates the return and analyzes the completed return for mistakes and raises potential audit flags. State tax preparation is available, in addition to electronic filing. TurboTax also uninstalls itself when the return is completed. Says that TurboTax prompts the user to find money-saving deductions that many tax accountants miss. Notes one significant problem with the way the program calculated a tax-exempt contribution to a Simplified Employee Pension IRA. Concludes that TurboTax is efficient. Contains two screen displays. (HHW)

Descriptors: Taxes; Window Software; Macintosh; CD-ROM; Software Review

Identifiers: TurboTax; MacInTax; Intuit

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US PAT NO: **5,138,549** [IMAGE AVAILABLE] L15: 1 of 1

ABSTRACT:

A system for the automatic processing of payroll, corporate profit and excise taxes. A depositor, via a communication link, engages in a question and answer exchange with one of a multiple number of voice synthesizers connected to a processor. Through the exchange, the depositor enters tax deposit information which the processor stores in its memory. At the end a specified time period, the processor stores tax deposit information relating to tax deposits due the same day on a storage medium such as a magnetic tape, and on tax coupons in formats predefined by the government agency. The processor also stores tax deposit information entered during the specified time period on a second storage medium to enable a bank to automatically transfer tax deposits from each depositor's account to a bank account. The system includes remote communication terminals connected by communication links to the processor through which information on depositors and tax deposit due dates is entered. The processor stores this information in a storage medium such as the processor's hard disk. In addition, the system includes hard copy printers through which the processor creates multiple records of each tax deposit.

DETDESC:

DETD(5)

The client information subsystem 30 is accessed by one or more bank

remote terminals 41 located at each remote subscriber bank and one or

more user's remote terminals 42 located at the primary processing center.

This subsystem allows bank personnel to input and update information on

authorized depositors through the bank remote terminals 41 **connected**

by communication links to the primary processor 45. System controllers

can input and update tax deposit due dates through user's remote terminals 42 which are also **connected** to the processor 45. The information is stored by the primary processor 45 in storage medium.

DETDESC:

DETD(11)

The primary processor 45 controls the interaction between the apparatus.

Multiple voice synthesizers 44, such as DECTalk units, are **connected**

to the primary processor 45. A depositor inputs tax deposit information

into the system through a depositor's remote terminal 46, such as a touch

tone telephone or a personal computer, which is **connected** to a voice

synthesizer 44 via a communication link, such as a conventional telephone

line. The interaction between the depositor's remote terminal 46 and a

voice synthesizer 44 is described in more detail in the discussion of

FIG. 5. The voice synthesizer 44 receives the tax deposit information

input by the depositor and transfers the information to the primary

processor 45. The information is then stored in several storage mediums,

such as a disk memory, and is printed on a hard copy, such as by a printer to produce a tax deposit record of the tax deposit information.

Although the discussion of the storage medium on which the tax deposit

information is stored will be directed toward disk memory, it will be

understood that the storage medium on which the information may be stored

may be any suitable storage medium, such as those described above.

Further, a second copy of the tax information may be stored in any

storage medium, such as magnetic tape. Printing the information with a printer is only one available option.

DETDESC:

DETD(22)

In the on-line subsystem 10, a multiple number of voice synthesizers 44 are linked to the primary processor 45. The voice synthesizers 44 and primary processor 45 are all located at the primary processing center. Tax deposit information is provided to the voice synthesizer 44 by a tax depositor from a remote location through a depositor's remote terminal 46 connected to the voice synthesizer 44 through communication links, such as telephone lines. The deposit information is then transferred to the primary processor 45 by the voice synthesizer 44. The primary processor 45 is linked to two storage mediums, an on-line client list storage means 60 and an on-line due dates storage means 62 located in storage mediums accessible by the primary processor 45, such as disk memory. The primary processor 45 verifies the depositor's identity and depositor status through a comparison to information stored in the on-line client list storage means 60. The depositor's identity and status may be verified by using any suitable access code system. Generally, one or more unique personal identification codes are assigned to each depositor to assure security within the system. A similar system is used by bank automatic teller machines. The primary processor 45 verifies the timeliness of the tax deposit through a comparison to the on-line due dates storage means 62.

DETDESC:

DETD(38)

After a depositor inputs tax deposit information, the depositor may utilize the automatic penalty protection technique. The depositor may

input information through the depositor's remote terminal 46 concerning  
tax deposits whose due dates are in the future. As stated above  
in  
**connection** with the description of FIG. 3, the primary processor  
45 will then automatically create a list of depositors who have not  
made tax deposits corresponding to the future payroll dates previously  
input.

DETDESC:

DETD(40)

FIG. 5 is a flow chart of an exchange between a depositor through a depositor's remote terminal 46 and a primary processor 45 located at the primary processing center. The depositor's remote terminal 46 is **connected** to a voice synthesizer 44 through communication links, such as telephone lines. In turn, the voice synthesizer 44 is coupled to the primary processor 45. In each exchange, the primary processor 45 transmits information to the depositor's remote terminal 46, via the voice synthesizer 44. The depositor transmits information to the primary processor 45 through the depositor's remote terminal 46 and the voice synthesizer 44.

=> s (tax report?) and(automat? or electron? or remot? or computer?)

2433 TAX  
193525 REPORT?  
30 TAX REPORT?  
(TAX(W) REPORT?)  
537343 AUTOMAT?  
460453 ELECTRON?  
253477 REMOT?  
258494 COMPUTER?  
L6 27 (TAX REPORT?) AND(AUTOMAT? OR ELECTRON? OR REMOT?  
OR COMPUT  
ER?  
)

=> d 16 1-

1. 5,918,218, Jun. 29, 1999, Method and apparatus for **automated** trade transactions processing; Randall C. Harris, et al., 705/37, 35 [IMAGE AVAILABLE]

2. 5,918,213, Jun. 29, 1999, System and method for **automated remote** previewing and purchasing of music, video, software, and other multimedia products; Warren E. Bernard, et al., 705/26, 27 [IMAGE AVAILABLE]

3. 5,910,988, Jun. 8, 1999, **Remote** image capture with centralized processing and storage; Claudio R. Ballard, 380/24 [IMAGE AVAILABLE]

4. 5,895,455, Apr. 20, 1999, Document image display system and method; David T. Bellinger, et al., 705/35, 42; 707/908 [IMAGE AVAILABLE]

5. 5,875,435, Feb. 23, 1999, **Automated** accounting system; Gordon T. Brown, 705/30, 33, 39 [IMAGE AVAILABLE]

6. 5,875,433, Feb. 23, 1999, Point of sale **tax reporting** and **automatic** collection system with tax register; Paul A. Francisco, et al., 705/26, 19 [IMAGE AVAILABLE]

7. 5,870,725, Feb. 9, 1999, High volume financial image media creation

and display system and method; David T. Bellinger, et al.,  
705/45, 44  
[IMAGE AVAILABLE]

8. 5,815,093, Sep. 29, 1998, **Computerized** vehicle log; Dan Kikinis,  
340/937, 426, 539, 541 [IMAGE AVAILABLE]

9. 5,802,501, Sep. 1, 1998, System and methods for computing to support decomposing property into separately valued components; Richard A. Graff,  
705/36, 31, 35, 38 [IMAGE AVAILABLE]

10. 5,799,283, Aug. 25, 1998, Point of sale governmental sales and use **tax reporting** and receipt system; Paul A. Francisco, et al., 705/19; 235/375; 705/31 [IMAGE AVAILABLE]

11. 5,774,872, Jun. 30, 1998, **Automated** taxable transaction reporting/collection system; Richard Golden, et al., 705/19; 235/376,  
383, 385; 705/20, 21, 31 [IMAGE AVAILABLE]

12. 5,517,406, May 14, 1996, Method and apparatus for data verification and position reporting in an **automated** trade transactions processing system; Randall C. Harris, et al., 705/30, 37 [IMAGE AVAILABLE]

13. 5,505,461, Apr. 9, 1996, Method for meeting IRS reporting requirements related to an **electronic** gaming machine; Lyle L. Bell,  
et al., 463/25; 235/382; 705/31 [IMAGE AVAILABLE]

14. 5,433,483, Jul. 18, 1995, Consumer-initiated, **automatic** classified expenditure bank check system; Mason K. Yu, 283/58, 57 [IMAGE AVAILABLE]

15. 5,428,542, Jun. 27, 1995, Vehicle mileage and information recording method and system; Aura L. Liesveld, 701/35; 340/990, 995; 701/1; 704/201, 270 [IMAGE AVAILABLE]

16. 5,335,169, Aug. 2, 1994, System for tracking multiple rate assessments on transactions; Malcolm K. L. Chong, 705/31 [IMAGE AVAILABLE]

17. 5,326,104, Jul. 5, 1994, Secure **automated electronic** casino gaming system; Logan L. Pease, et al., 463/18; 273/269; 463/25, 29, 42;  
902/23 [IMAGE AVAILABLE]

18. 5,191,522, Mar. 2, 1993, Integrated group insurance information processing and reporting system based upon an enterprise-wide data structure; James J. Bosco, et al., 705/4 [IMAGE AVAILABLE]

19. 4,985,833, Jan. 15, 1991, Extended coverage monetary regulation system; John E. Oncken, 705/42, 39 [IMAGE AVAILABLE]

20. 4,875,167, Oct. 17, 1989, Odometer data computing apparatus; John W. Price, et al., 701/35; 346/33D, 33R [IMAGE AVAILABLE]

21. 4,837,693, Jun. 6, 1989, Method and apparatus for facilitating operation of an insurance plan; Barry R. Schotz, 705/4 [IMAGE AVAILABLE]

22. 4,813,013, Mar. 14, 1989, Schematic diagram generating system using library of general purpose interactively selectable graphic primitives to create special applications icons; Robert M. Dunn, 345/333, 117, 146, 334, 348; 364/917.96, 927.2, 927.4, 927.61, 927.63, 927.7, 927.92, 928, 928.2, 928.3, 929.12, 971.1, 972, 972.2, 972.3, 977, 977.1, DIG.2; 395/500.02, 500.12 [IMAGE AVAILABLE]

23. 4,774,664, Sep. 27, 1988, Financial data processing system and method; Joseph J. Campbell, et al., 705/38; 364/400; 380/24 [IMAGE AVAILABLE]

24. 4,752,877, Jun. 21, 1988, Method and apparatus for funding a future liability of uncertain cost; Peter A. Roberts, et al., 705/35; 235/379; 705/36 [IMAGE AVAILABLE]

25. 4,677,429, Jun. 30, 1987, Vehicle information on-board processor; Ronald W. Glotzbach, 345/168; 340/459, 521; 345/124, 146; 701/35 [IMAGE AVAILABLE]

26. 4,656,603, Apr. 7, 1987, Schematic diagram generating system using library of general purpose interactively selectable graphic primitives to create special applications icons; Robert M. Dunn, 345/348, 146, 333,

334, 340, 349; 364/188, 916, 916.2, 917, 917.3, 918, 918.9, 920,  
920.2, 927.2, 927.4, 927.6, 927.62, 927.63, 928, 928.2, 928.5, 929.3,  
932,  
932.7, 933.9, 943, 943.5, 947, 947.5, 948.2, 972, 972.2, 972.3,  
974, 977,  
977.1, 977.3, DIG.2; 395/500.02, 500.12; 706/60 [IMAGE AVAILABLE]

27. 4,109,686, Aug. 29, 1978, Tax adjusting vehicle gasoline  
filler  
equipment; Jacque R. Phillips, 141/1, 94, 98, 347 [IMAGE  
AVAILABLE]

=> s tax prepar? and(automat? or electron? or computer?)

2433 TAX  
698338 PREPAR?  
31 TAX PREPAR?  
(TAX(W) PREPAR?)  
537343 AUTOMAT?  
460453 ELECTRON?  
258494 COMPUTER?  
L3 29 TAX PREPAR? AND(AUTOMAT? OR ELECTRON? OR  
COMPUTER?)

=> d 1-

1. 5,911,136, Jun. 8, 1999, System for prioritized operation of a personal financial account comprising liabilities and investment assets; Charles Agee Atkins, 705/36, 35, 37, 38 [IMAGE AVAILABLE]
2. 5,911,135, Jun. 8, 1999, System for managing financial accounts by a priority allocation of funds among accounts; Charles Agee Atkins, 705/36, 35, 37, 38 [IMAGE AVAILABLE]
3. 5,910,988, Jun. 8, 1999, Remote image capture with centralized processing and storage; Claudio R. Ballard, 380/24 [IMAGE AVAILABLE]
4. 5,884,285, Mar. 16, 1999, System for managing financial accounts by reallocating funds among accounts; Charles Agee Atkins, 705/36, 35, 37, 38 [IMAGE AVAILABLE]
5. 5,875,437, Feb. 23, 1999, System for the operation and management of one or more financial accounts through the use of a digital communication and computation system for exchange, investment and borrowing; Charles Agee Atkins, 705/40 [IMAGE AVAILABLE]
6. 5,875,435, Feb. 23, 1999, **Automated** accounting system; Gordon T.

Brown, 705/30, 33, 39 [IMAGE AVAILABLE]

7. 5,875,433, Feb. 23, 1999, Point of sale tax reporting and **automatic** collection system with tax register; Paul A. Francisco, et al., 705/26, 19 [IMAGE AVAILABLE]

8. 5,864,828, Jan. 26, 1999, Personal financial management system for creation of a client portfolio of investment and credit facilities where funds are distributed based on a preferred allocation; Charles Agee Atkins, 705/36, 38, 39 [IMAGE AVAILABLE]

9. 5,852,811, Dec. 22, 1998, Method for managing financial accounts by a preferred allocation of funds among accounts; Charles Agee Atkins, 705/36, 35, 37, 38 [IMAGE AVAILABLE]

10. 5,819,249, Oct. 6, 1998, Tax coding expert system; Laurel Anne Dohanich, et al., 706/46, 50, 59, 60 [IMAGE AVAILABLE]

11. 5,784,555, Jul. 21, 1998, **Automation** and dial-time checking of system configuration for internet; Jeremy Daniel Stone, 709/220 [IMAGE AVAILABLE]

12. 5,724,523, Mar. 3, 1998, **Electronic** income tax refund system utilizing the tax refund to underwrite issuance of a secured credit card; Ross N. Longfield, 705/35, 31, 39 [IMAGE AVAILABLE]

13. 5,684,965, Nov. 4, 1997, **Automated** billing consolidation system and method; Richard E. Pickering, 705/34; 235/379; 283/60.1; 705/40, 45 [IMAGE AVAILABLE]

14. 5,664,208, Sep. 2, 1997, Methods and apparatuses for seamless compound document processing; John Franklin Pavley, et al., 707/515; 345/335; 707/514, 516, 531 [IMAGE AVAILABLE]

15. 5,644,727, Jul. 1, 1997, System for the operation and management of one or more financial accounts through the use of a digital communication and computation system for exchange, investment and borrowing; Charles

Agee Atkins, 705/40 [IMAGE AVAILABLE]

16. 5,630,073, May 13, 1997, Personal account tracking system; Jon D. Nolan, 705/45 [IMAGE AVAILABLE]

17. 5,600,643, Feb. 4, 1997, Broadband intelligent telecommunications network and method providing enhanced capabilities for customer premises equipment; Richard B. Robrock, II, 370/399, 259, 426; 379/115 [IMAGE AVAILABLE]

18. 5,496,177, Mar. 5, 1996, Method and apparatus for presenting new computer software functions to a user based upon actual usage; Sherry S. Collia, et al., 434/118; 345/352, 356; 364/286, 948.2, 974.3, DIG.1, DIG.2; 434/322, 323, 335 [IMAGE AVAILABLE]

19. 5,483,445, Jan. 9, 1996, **Automated** billing consolidation system and method; Richard E. Pickering, 705/40, 34 [IMAGE AVAILABLE]

20. 5,463,093, Oct. 31, 1995, Palladium complexes and methods for using same in the treatment of tumors or Psoriasis; Merrill Garnett, 554/102, 101; 556/136; 562/606; 568/64 [IMAGE AVAILABLE]

21. 5,433,483, Jul. 18, 1995, Consumer-initiated, **automatic** classified expenditure bank check system; Mason K. Yu, 283/58, 57 [IMAGE AVAILABLE]

22. 5,193,057, Mar. 9, 1993, **Electronic** income tax refund early payment system with means for creating of a new deposit account for receipt of an **electronically** transferred refund from the IRS; Ross N. Longfield, 705/31, 39 [IMAGE AVAILABLE]

23. 5,193,055, Mar. 9, 1993, Accounting system; Gordon T. Brown, et al., 705/33 [IMAGE AVAILABLE]

24. 4,967,368, Oct. 30, 1990, Expert system with knowledge base having term definition hierarchy; Richard W. Bolling, et al., 706/52, 45 [IMAGE AVAILABLE]

25. 4,953,085, Aug. 28, 1990, System for the operation of a financial

account; Charles A. Atkins, 705/36; 364/918, 918.1, 918.3, DIG.2; 705/38

[IMAGE AVAILABLE]

26. 4,916,633, Apr. 10, 1990, Expert system apparatus and methods; Louis

P. Tychonievich, et al., 706/60; 364/224.5, 228.4, 274, 274.1, 274.2, 274.3, 274.5, 275.1, 275.7, 933.9, 972, 972.1, 972.2, 972.3, 977, DIG.1, DIG.2; 706/45 [IMAGE AVAILABLE]

27. 4,890,228, Dec. 26, 1989, **Electronic** income tax refund early payment system; Ross N. Longfield, 705/31; 364/918, 918.2, 918.3, 920, 928, 928.1, 935, 935.2, 943, 943.1, 947, 947.2, 977, 977.2, DIG.2; 705/39

[IMAGE AVAILABLE]

28. 4,484,304, Nov. 20, 1984, Transaction execution system having

keyboard and message customization, improved key function versatility and

message segmentation; Robert W. Anderson, et al., 345/329; 235/380; 345/352; 364/918, 918.2, 926.9, 927.2, 928, 928.6, 932, 932.1, 933.9, 952, 952.1, 952.4, 959.1, 974, DIG.2; 902/20, 40 [IMAGE AVAILABLE]

29. 4,319,336, Mar. 9, 1982, Transaction execution system with improved

key function versatility; Robert W. Anderson, et al., 705/21; 235/380;

364/222.2, 222.5, 225, 225.2, 225.6, 225.8, 226.4, 228.4, 234, 234.2, 237.2, 237.3, 237.6, 238.3, 239, 239.3, 239.7, 248.1, 248.2, 252.3, 252.4, 255, 255.1, 255.7, 256.3, 256.4, 260, 260.1, 260.4, 260.9, 264, 264.6, 282.1, 283.3, 286, 286.1, 918, 918.1, 918.2, 918.3, 926.9, 927.2, 927.8, 927.92, 927.97, 927.98, 927.99, 928, 928.1, 928.2, 929, 929.2, 930, 932, 932.1, 935, 935.2, 940, 940.1, 940.2, 940.71, 943.9, 946, 948.2, 949, 949.4, 952, 952.1, 952.4, 952.6, 959.1, 964, 965, 965.5, 969, 969.4, 975.2, DIG.1, DIG.2; 902/20, 39 [IMAGE AVAILABLE]

=> s 5193057/pn

L7 1 5193057/PN

=> s 17 and(state? or local)

1018659 STATE?

154637 LOCAL

L8 1 L7 AND(STATE? OR LOCAL)

=> d hit

US PAT NO: 5,193,057 [IMAGE AVAILABLE]

L8: 1 of 1

SUMMARY:

BSUM(3)

In recent years, taxing authorities have increasingly automated the tax collecting and tax return filing process. In particular, the United States Internal Revenue Service has instituted a system for the electronic filing of tax return data. In conjunction with that system, the IRS has arranged to pay refunds by electronic funds transfer using the Treasury ACH origination system. While this has greatly improved the tax filing and refund process it still requires a period of three to six weeks from the filing of an individual's tax return to the time of receipt of a refund check.

SUMMARY:

BSUM(6)

The present invention is a unique combination of data processing programs resulting in a data processing system that provides a tax refund payment within 24-48 hours from the time of filing a tax return. In the present embodiment an Electronic Filing Program prepares a 1040, 1040A or 1040EZ federal tax return acceptable for electronic transmission to the United States Internal Revenue Service, on the basis of tax filer

provided data. At the same time, the tax filer applies for a refund loan and, on the basis of filer provided credit data, a deposit/loan account is opened at a authorized financial institution. In a preferred use of the system of the invention, the entire transaction takes place at the offices of an authorized tax return preparer. Such a use of the system provides the tax filer with the benefit of having a tax return prepared and filed on one day and picking up a check at the same office for any refund due, less tax preparation fees and filing fees, on the next day; all without an out of pocket payment by the tax filer.

DETDESC:

DETD(3)

Once data input is complete, a program process is executed by a data processing means to create electronic tax return files 20 which are in a form accepted by the taxing authority processing the taxpayer tax return.

In the present embodiment a program flow chart of an Electronic Filing Program for preparing 1040, 1040A and 1040EZ tax returns in electronic

format acceptable to the United **States** Internal Revenue Service comprises Microfiche Appendix I hereto. It is also necessary to validate

tax return data and loan application data as is shown in block 30.

Validation of tax return data including mathematical checking is performed by the Electronic Filing Program of Microfiche Appendix I. In

addition, individual identification data is compared to a file containing

credit information to identify individuals with unacceptable credit histories.

=> s 17 and telecommunic?

L11            21269 TELECOMMUNIC?  
              1 L7 AND TELECOMMUNIC?

=> d hit

US PAT NO:      **5,193,057** [IMAGE AVAILABLE]                    L11: 1 of 1

DETDESC:

DETD(15)

After all required tax returns have been entered the preparer can transmit the returns to the remote processing center. This is accomplished by selecting the 'NEW TRANSMISSION FILE' entry from the main screen. When this item is selected the transmit screen is displayed, the preparer indicates the returns to be transmitted by changing the status code on the transmit screen to 'T'. The system then adds these tax returns to the transmit file, dials the remote processor center number, and transmits the data over either dedicated or ordinary **telecommunication** lines.

=> s 17 and storag?

L14            442781 STORAG?  
              1 L7 AND STORAG?

=> d hit

US PAT NO:      5,193,057 [IMAGE AVAILABLE]                    L14: 1 of 1

DETDESC:

DETD(2)

Referring now to FIG. 1 here shown in schematic flow diagram form overall depiction of the data processing functions for implementing the invention. Input means 10 is used for inputting tax taxpayer identification, taxpayer tax return information and refund anticipation load information. In preferred embodiment input means 10 comprises and intelligent terminal such as a personal computer having programmable data processing arithmetic and logical functions a keyboard visual monitor data **storage** and data transmission capabilities. Data input using such an input means is hereinafter described in more detail.

CLAIMS:

CLMS(2)

2. The electronic data processing system of claim 1 wherein said input means includes keyboard input means, visual monitor means, data **storage** means, data transmission means and programmable data processing means for executing said program means for processing said tax preparer data and said tax return data and transmitting said electronic tax return data files and said payment data, to a remote processing center.

File 2:INSPEC 1969-1999/Aug W4  
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File 8:Ei Compendex(R) 1970-1999/Aug W4  
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File 144:Pascal 1973-1999/Aug  
(c) 1999 INIST/CNRS  
File 77:Conference Papers Index 1973-1999/Sep  
(c) 1999 Cambridge Sci Abs  
File 434:SciSearch(R) Cited Ref Sci 1974-1989/Dec  
(c) 1998 Inst for Sci Info  
File 34:SciSearch(R) Cited Ref Sci 1990-1999/Aug W5  
(c) 1999 Inst for Sci Info  
File 233:Microcomputer Abstracts 1974-1999/Sep  
(c) 1999 Information Today Incl.  
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File 35:Dissertation Abstracts Online 1861-1999/Sep  
(c) 1999 UMI  
File 139:Econ. Lit. Index 1969-1999/Sep  
(c) 1999 American Economic Association

Set	Items	Description
S1	2487	(TAX OR TAXES OR INLAND()REVENUE) (15N) (FILING OR FILE? ? OR REPORT?)
S2	1056	(TAX OR TAXES OR INLAND()REVENUE) (15N) (PREPAR? OR (FILL??-()IN OR COMPLET?)) (3N) (FORM? ? OR RETURN? ? OR DOCUMENT?))
S3	1459083	COLLECT? OR GATHER? OR COMPIL? OR ASSEMB?
S4	5883613	INFORMATION OR DATA OR (BANK? ? OR BROKERAGE? OR INTEREST - OR FINANCIAL OR MORTGAGE OR PAYROLL OR EMPLOYER) (3N) STATEMENT?
S5	1288	... (MULTIPLE OR MANY OR DIVERSE OR PLURAL? OR MUTUAL() FUND? OR INVESTMENT?) (5N) STATEMENT? OR FORM? ?(5N) (W2 OR W()2 OR 1099 OR 1098)
S6	242	CHARIT?(5N) (CONTRIBUTION? OR RECEIPT? OR DONATION?)
S7	5884428	S4 OR S5 OR S6
S8	4207	EFT OR EFTS OR ELECTRONIC?(1N) FUNDS (1N) TRANSFER? OR (ELECTRONIC OR E OR DIGITAL OR VIRTUAL) () (CASH OR WALLET OR PURSE - OR MONEY ) OR ECASH OR EMONEY OR EPAYMENT?
S9	3500	(PAY? OR REFUND?) (15N) (ELECTRONIC? OR ONLINE OR ON()LINE OR INTERNET)
S10	0	S1 AND S2 AND S3(S)S7 AND (S8 OR S9)
S11	1	(S1 OR S2) AND S3(10N)S7 AND (S8 OR S9)
S12	180	(S1 OR S2) AND (S3(7N)S7 OR S8 OR S9)
S13	5279820	ELECTRONIC? OR AUTOMATE? OR AUTOMATION OR COMPUTER? OR INTERNET? OR WEB OR VIRTUAL OR DIGITAL?
S14	58726	TAX OR TAXES OR INLAND()'REVENUE
S15	78266	S13(5N) (PREPAR? OR REPORT? OR FILE? ? OR FILING OR (FILL??-()IN OR COMPLET?)) (3N) (FORM? ? OR RETURN? ? OR DOCUMENT?))
S16	0	S14 AND S15 AND S3(5N)S7 AND (S8 OR S9)
S17	32	S14 AND S15 AND (S3(5N)S7 OR S8 OR S9)
S18	32	RD (unique items)

18/7/1 (Item 1 from file: 2)

DIALOG(R)File 2:INSPEC

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5980153

Title: Fed taps small firm for EFT translation software

Author(s): Levinsohn, A.

Journal: ABA Banking Journal vol.90, no.5 p.76

Publisher: Simmons-Boardman Publishing for American Bankers Assoc,

Publication Date: May 1998 Country of Publication: USA

CODEN: ABAJD5 ISSN: 0194-5947

SICI: 0194-5947(199805)90:5L.76:TSFT;1-0

Material Identity Number: B557-98006

Language: English Document Type: Journal Paper (JP)

Treatment: Practical (P)

Abstract: The Federal Reserve System has hired a small but rapidly growing developer of **electronic payment** software, Bottomline Technologies of Portsmouth, NH, to custom-make a piece of software that is expected to help member banks comply with the US Treasury Department's **Electronic Funds Transfer** '99 initiative. **EFT** '99 mandates that all federal **payments** -Social Security benefits, **tax** credits, and **payments** to companies for products and services-be made **electronically**. Bottomline's software will help the Treasury Department and **payee** banks fulfill one aspect of **EFT** '99: payments for products and services which are attached to an **automated clearing house file**. (0 Refs)

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18/7/2 (Item 2 from file: 2)

DIALOG(R)File 2:INSPEC

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5198589

Title: Government revenue: building an EC future

Author(s): Lyon, J.

Author Affiliation: Federation of Tax Adm., Washington, DC, USA

Journal: EDI Forum vol.8, no.4 p.43-7

Publisher: EDI Group,

Publication Date: 1995 Country of Publication: USA

CODEN: EDFOE2 ISSN: 1048-3047

SICI: 1048-3047(1995)8:4L.43:GRBF;1-9

Material Identity Number: P881-96001

Language: English Document Type: Journal Paper (JP)

Treatment: General, Review (G)

Abstract: The implementation of electronic commerce technologies in the **tax** administration arena will provide substantial opportunities not only for **tax** filers, but also their agents and **tax** authorities to improve the way they all do business. **Tax** authorities can reengineer paper-bound business processes, increase data accuracy, and enhance service. **Tax** payers can accomplish similar goals: eliminate the burdensome paper processes, improve confidentiality and security in their **tax** compliance function, and benefit by increased peace of mind-the certainty that their return was received accurately. **Tax** agencies are increasingly employing EDI and other EC techniques to exchange **tax** data. To wit, the federal government and more than 30 states intend to implement enhanced EC capabilities between 1995 and 1997. This expansion will offer taxpayers and their agents the opportunity to decrease their cost of **tax** compliance and allow them to better focus their attention and resources on value-oriented, profit-making activities. A variety of developments have facilitated this movement, including the implementation of **electronic tax payment** programs by the states and IRS; the creation of ASC X12 national standard formats for filing **tax** data and receipt acknowledgment, which leads to **electronic** return **filing** programs; interest in alternative EC technologies for interacting with **tax** administrations; and the deployment of government-cooperative EC services. (0 Refs)

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18/7/3 (Item 3 from file: 2)

DIALOG(R)File 2:INSPEC

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5164718

Title: Electronic tax filing attracts corporate customers

Author(s): Morrall, K.

Journal: Bank Marketing vol.28, no.1 p.43-4

Publisher: Bank Marketing Assoc,

Publication Date: Jan. 1996 Country of Publication: USA

CODEN: BAMAFA ISSN: 0888-3149

SICI: 0888-3149(199601)28:1L.43:EFAC;1-S

Material Identity Number: D539-96001

Language: English Document Type: Journal Paper (JP)

Treatment: Practical (P)

Abstract: While many banks have abandoned electronic tax refund filing services for their retail customers, they are finding a bonanza of opportunity in electronic tax payment services for their corporate customers. Changes in the Internal Revenue Service's procedures last year made many banks wary of offering refund anticipation loans (RALs) to retail customers. The IRS stopped providing confirmation of federal liens against refunds, which was a crucial piece of information for evaluating RAL applications. Many banks feared without the credit checks from the federal government, small-loan customers would take the money and run. While those changes have prompted many banks to bail out of the electronic tax refund filing business, changes in IRS policy for corporate tax payments have opened new doors. (0 Refs)

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18/7/4 (Item 4 from file: 2)

DIALOG(R)File 2:INSPEC

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4965357

Title: Paying Uncle Sam electronically: banks, corporates plan for EFTPS

Author(s): Sraeel, H.

Journal: Bank Systems + Technology vol.32, no.1 p.20, 22

Publication Date: Jan. 1995 Country of Publication: USA

CODEN: BSYTEE ISSN: 1045-9472

Language: English Document Type: Journal Paper (JP)

Treatment: Practical (P)

Abstract: Corporate taxpayers that already file state taxes electronically can soon look forward to doing the same for federal taxes with the new nationwide electronic federal tax payment system (EFTPS) due to be in full swing by September 1995. The EFTPS will give more than six million businesses the option of using either an ACH credit or ACH debit to initiate federal tax payment-all from PCs, touch-tone telephones, mainframes and point-of-sale (POS) terminals. (0 Refs)

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18/7/5 (Item 5 from file: 2)

DIALOG(R)File 2:INSPEC

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4876411

Title: Look out home banking, here comes William The Conqueror (Bill Gates, Microsoft and banking services)

Author(s): Radigan, J.

Journal: US Banker vol.104, no.12 p.22-6, 60

Publication Date: Dec. 1994 Country of Publication: USA

CODEN: UBANEY ISSN: 0148-8848

U.S. Copyright Clearance Center Code: 0148-8848/94/\$5.00

Language: English Document Type: Journal Paper (JP)

Treatment: Economic aspects (E); General, Review (G)

Abstract: The price that Microsoft was willing to pay for Intuit was

Country of Publication: United States

Contract No.: DI-14-08-0001-G-1566

Phosphorus Availability from Woodash' compared P availability from fertilizer relative to woodash as a source. Results indicate that the standard Maine soil testing extractant may not sensitively assess plant availability of P in woodash-amended soils. 'Preliminary Evaluation of Natural Controlling Factors for the Sensitivity of Maine Lakes to Phosphorus Loading' has begun assembling existing data to determine whether causal factors can be identified which allow prediction of vulnerable lakes prior to the onset of eutrophication. Preliminary results from 'The Efficiency of Constructed Wetland-Pond Systems in Reducing Sediment and Nutrient Discharges from Agricultural Watersheds' suggest that wetland-pond systems designed to reduce sediment and nutrient runoff from agricultural land are very effective. Ninety percent or more of the incoming phosphorus and suspended solid mass were retained by the system during two storm events. 'Impacts of Landspreading Wastes on Vadose Water Quality' has evaluated preliminary data from plots spread with papermill sludge. Initial results suggest reason for concern that the sludge may contribute to the deterioration of subsurface water quality. 'Organizing Information for Improved Groundwater Management' reports progress on procedures and computer algorithms to geocode wells and underground storage tanks using community tax base maps and Census Bureau data.

18/7/16 (Item 4 from file: 6)

DIALOG(R) File 6:NTIS

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1485120 NTIS Accession Number: DE89635278

**Alive Searches as Complementing Death Searches in the Epidemiological Follow-Up of Ontario Miners**

Fair, M. E. ; Newcombe, H. B. ; Lalonde, P. ; Poliquin, C.

Atomic Energy Control Board, Ottawa (Ontario).

Corp. Source Codes: 003407000; 0629000

Report No.: INFO-0266

Feb 88 47p

Languages: English

Journal Announcement: GRAI9008

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NTIS Prices: PC A03/MF A01

Country of Publication: Canada

'Alive' searches have been used to complement the 'death' searches, in a study of the mortality experience of a cohort of Ontario miners. The purpose has been to develop a way of distinguishing between those cohort members who are 'confirmed' alive at a given time, and those who are 'lost to follow-up'. A total of 30,000 Workers' Compensation Board (WCB) records with valid Social Insurance Numbers (SIN) were used to search the income tax files by computer over two consecutive years (1977 and 1978) representing nearly 27 million tax returns. These tax file searches using SIN numbers have provided information on the procedures to be used in, and likely success of, the corresponding searches of the tax files that could be carried out where the SIN number is not available on the work records. The latter kind of search would have to be based on names, birth dates and such, and would be probabilistic in nature. The results of the study were as follows: After the initial death search, it was found that 7.5% of the cohort had died in Canada and their records were found on the Mortality Data Base. The remaining 92.5% has been 'assumed alive' in the earlier analysis. After the 'alive' follow-up using the income tax file, one was able to confirm that 89.1% of the 'assumed alive' had filed an income tax after the study period. Thus only 3.4% of the cohort remained untraced. Among those there could be an admixture of deaths outside of Canada, persons who have moved outside of Canada and are still alive, and/or persons alive within Canada, but who have not filed an income tax return. This study has indicated that the procedures developed are useful for purposes of 'alive' follow-up, for evaluation of the quality of the

Journal: Computers in Banking vol.7, no.5 p.12, 14, 20

Publication Date: May 1990 Country of Publication: USA

CODEN: CBANE6 ISSN: 0742-006

Language: English Document Type: Journal Paper (JP)

Treatment: Practical (P)

Abstract: With the 1990 tax season over, how well has the Internal Revenue Service's Electronic Filing System (EFS) performed? IRS claims of refunds being directly deposited to bank accounts in as little as three days from the time the form is filed are at best exaggerated. Bankers say a three- to five-week turn-around is closer to the truth. System outages at IRS centers, networking problems, lost computer tapes, and human filing errors, have all contributed to the longer turnaround. Nevertheless, despite the apparent problems, EFS's popularity continues to increase...The number of returns filed electronically has increased from 25000 to 1.2 million in four years. (0 Refs)

18/7/12 (Item 12 from file: 2)

DIALOG(R) File 2:INSPEC

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03641830 INSPEC Abstract Number: D90001526

Title: Faster refund drive automation of tax preparation: the sooner you file .

Author(s): Garvey, M.

Journal: InformationWEEK , no.265 p.21, 24

Publication Date: 9 April 1990 Country of Publication: USA

CODEN: INFWE4 ISSN: 8750-6874

Language: English Document Type: Journal Paper (JP)

Treatment: Applications (A); Practical (P)

Abstract: Quick and early refunds are a felicitous by-product of the Internal Revenue Service's movement toward electronic filing of returns. In turn, electronic filing has posed new challenges to tax preparers, who are ferociously competing to offer the fastest turnaround. These firms are targeting a large number of American taxpayers-more than 70% are eligible for a refund . Rapid Refund is the name used by H&R Block Inc. for its electronic filing service. Its current configuration consists of a cluster of six DEC VAX machines-a 6000-410 and five 8550s-of which two serve as backup. This cluster serves as the central hub for 750 Block offices nationwide, the IRS's three electronic transmission centers, and three banks participating. Block field offices work with IBM PS/2 Model 30s, and more recently, Model 1000 TL PCs from Tandy Corp. The Rapid Refund PC frontend program logs on to the network and processes the data entry, freeing the central hub for communication to the IRS. Block differs from some competitors in that the actual tax preparation is still done manually-only some processing and transmission is automated. (0 Refs)

18/7/13 (Item 1 from file: 6)

DIALOG(R) File 6:NTIS

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2103073 NTIS Accession Number: PB99-105496/XAB

U.S. Government Working Group on Electronic Commerce. Annual Report  
(1st), November 1998

Executive Office of the President, Washington, DC. The White House  
Office.

Corp. Source Codes: 013719036

Nov 98 39p

Languages: English

Journal Announcement: GRAI9904

See also PB97-191258, PB98-137011, and PB98-137029.

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located at 5285 Port Royal Road, Springfield, VA, 22161, USA.

NTIS Prices: PC A04/MF A01

Country of Publication: United States

The report continues the work initiated last year with the release in July of 1997 of the Administration's 'A Framework for Global Electronic Commerce.' The Framework established a set of principles and policies that together provide a new vision for commerce in the digital age--guidelines that strive to protect the public interest while liberating private enterprise from unnecessary regulations that would stifle innovation. The report describes the Administration's progress in implementing the strategy and presents five new areas of focus for the future.

18/7/14 (Item 2 from file: 6)

DIALOG(R)File 6:NTIS

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1926411 NTIS Accession Number: PB96-128012

**Federal Financial Management Status Report and Five-Year Plan, July 1995**

Office of Management and Budget, Washington, DC.

Corp. Source Codes: 012565000

Report No.: ISBN-0-16-048266-6

Jul 95 64p

Languages: English

Journal Announcement: GRAI9605

Also available from Supt. of Docs. See also report dated Aug 93, PB96-110234.

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NTIS Prices: PC A04/MF A01

Country of Publication: United States

The Office of Management and Budget (OMB) is pleased to submit the 1995 Federal Financial Management Status Report and Five-Year Plan. This document, which is prepared pursuant to the Chief Financial Officers (CFOs) Act of 1990, is OMB's fourth annual report on government-wide efforts to improve financial management performance. The CFOs Act provides important tools to run government better and to restore the public's confidence in government. This year's report describes the priorities that the CFO Council and OMB have established to achieve their financial management goals. They include improving financial management systems, effectively implementing the Government Performance and Results Act, issuing comprehensive government accounting standards, developing agency-wide audited financial statements, developing a quality financial management workforce, improving tax and debt collection, making management more accountable through performance reporting, facilitating electronic payments, and improving the administration of Federal grants.

18/7/15 (Item 3 from file: 6)

DIALOG(R)File 6:NTIS

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1536100 NTIS Accession Number: PB90-274051

**Fiscal Year 1989 Program Report: Maine Environmental Studies Center**

White, G. K.

Maine Univ. at Orono. Environmental Studies Center.

Corp. Source Codes: 050804005

Sponsor: Geological Survey, Reston, VA. Water Resources Div.

Report No.: USGS/G-1566-02

Jul 90 32p

Languages: English

Journal Announcement: GRAI9024

See also report for 1988, PB90-165168. Sponsored by Geological Survey, Reston, VA. Water Resources Div.

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NTIS Prices: PC A03/MF A01

Country of Publication: United States

Contract No.: DI-14-08-0001 G-1566

Phosphorus Availability from Woodash' compared P availability from fertilizer relative to woodash as a source. Results indicate that the standard Maine soil testing extractant may not sensitively assess plant availability of P in woodash-amended soils. 'Preliminary Evaluation of Natural Controlling Factors for the Sensitivity of Maine Lakes to Phosphorus Loading' has begun assembling existing data to determine whether causal factors can be identified which allow prediction of vulnerable lakes prior to the onset of eutrophication. Preliminary results from 'The Efficiency of Constructed Wetland-Pond Systems in Reducing Sediment and Nutrient Discharges from Agricultural Watersheds' suggest that wetland-pond systems designed to reduce sediment and nutrient runoff from agricultural land are very effective. Ninety percent or more of the incoming phosphorus and suspended solid mass were retained by the system during two storm events. 'Impacts of Landspreading Wastes on Vadose Water Quality' has evaluated preliminary data from plots spread with papermill sludge. Initial results suggest reason for concern that the sludge may contribute to the deterioration of subsurface water quality. 'Organizing Information for Improved Groundwater Management' reports progress on procedures and computer algorithms to geocode wells and underground storage tanks using community tax base maps and Census Bureau data.

18/7/16 (Item 4 from file: 6)

DIALOG(R) File 6:NTIS

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1485120 NTIS Accession Number: DE89635278

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Fair, M. E. ; Newcombe, H. B. ; Lalonde, P. ; Poliquin, C.

Atomic Energy Control Board, Ottawa (Ontario).

Corp. Source Codes: 003407000; 0629000

Report No.: INFO-0266

Feb 88 47p

Languages: English

Journal Announcement: GRAI9008

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NTIS Prices: PC A03/MF A01

Country of Publication: Canada

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Mortality Data Base-cohort death file searches, for improving the accuracy of analytical results of epidemiological studies, and for reducing the cost and labor of resolving doubtful death searches. (Atomplex citation 20:063864)

18/7/17 (Item 5 from file: 6)

DIALOG(R) File 6:NTIS  
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0475620 NTIS Accession Number: N74-34790/7/XAB

**Use of Remote Sensing Techniques for Inventorying and Planning Utilization of Land Resources in South Dakota**

(Annual Progress Report, Jul. 1973 -- Jun. 1974)

Myers, V. I. ; Frazee, C. J. ; Rusche, A. E. ; Moore, D. G. ; Nelson, G.

D.

South Dakota State Univ., Brookings. Remote Sensing Inst.

Report No.: NASA-CR-140574; SDSU-RSI-74-08

Jun 74 96p

Journal Announcement: GRAI7503; STAR1224

Misc-Original Contains Color Illustrations.

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NTIS Prices: PC A05/ME A01

Contract No.: NGL-42-003-007

The basic procedures for interpreting remote sensing imagery to rapidly develop general soils and land use inventories were developed and utilized in Pennington County, South Dakota. These procedures and remote sensing data products were illustrated and explained to many user groups, some of whom are interested in obtaining similar data. The general soils data were integrated with land soils data supplied by the county director of equalization to prepare a land value map. A computer print-out of this map indicating a land value for each quarter section is being used in tax reappraisal of Pennington County. The land use data provided the land use planners with the present use of land in Pennington County. Additional uses of remote sensing applications are also discussed including tornado damage assessment, hail damage evaluation, and presentation of soil and land value information on base maps assembled from ERTS-1 imagery. (Author)

18/7/18 (Item 6 from file: 6)

DIALOG(R) File 6:NTIS  
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0080345 NTIS Accession Number: AD-603 6/0/XAB

**A Model of Metropolis**

Lowry, I. S.

Rand Corp Santa Monica Calif

Corp. Source Codes: 888888888

Report No.: RM-40535-RC

Aug 64 2p

Journal Announcement: USGRDR6501

Order this product from NTIS by: phone at 1-800-553-NTIS (U.S. customers); (703) 605-6000 (other countries); fax at (703) 321-8547; and email at orders@ntis.fedworld.gov. NTIS is located at 5285 Port Royal Road, Springfield, VA, 22161, USA.

NTIS Prices: PC A02

This report describes a computer model of the spatial organization of human activities within a metropolitan area. The model is intended for eventual use as 1) a device for evaluating the impact of public decisions (e.g., concerning urban renewal, tax policies, land-use controls, transportation investments) on metropolitan form; and 2) a device for predicting changes in metropolitan form which will follow over time as a consequence of currently visible or anticipated changes in key variables such as the pattern of 'basic' employment, the efficiency of the transportation system, or the growth of population. The development of the

model to the stage at which it becomes a practical tool for planning and decision-making will require more time and effort. The first-generation model described in this report has been fitted to data from Pittsburgh, Pennsylvania, and enough experimental computer-runs have been completed to allow an appraisal of the practicability of my approach, and to indicate the strong and weak points of the model and also of the available data. The findings reported here offer guidance both to the development of a second-generation model and to data collection programs. (Author) ✓

18/7/19 (Item 1 from file: 233)

DIALOG(R) File 233:Microcomputer Abstracts

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00474070 97SN10-006

Uncle Sam wants you! to stop writing those checks -- The government is undertaking a massive campaign to persuade businesses to send and receive payments electronically. But the...

Dash, Julekha

Software Magazine , October 1, 1997 , v17 n1 p69-71, 3 Page(s)

ISSN: 0897-8085

Reports that the **Electronic Federal Tax Payment System (EFTPS)** is intended to lead to the eventual replacement of paper checks with **electronic payments**. Explains the initiative is designed to minimize fraud, and lower the costs of cutting and clearing checks. States companies with employment tax deposits exceeding \$50,000 will be required by the Internal Revenue Service to pay their federal taxes electronically starting July 1, 1998, and that by January 1, 1999, companies with tax deposits exceeding \$20,000 will be required to comply with EFTPS. Also says EFTPS requires all companies to receive payment from the federal government **electronically** by January 1, 1999. Includes pie chart set, a diagram, and a sidebar. (dpm)

18/7/20 (Item 2 from file: 233)

DIALOG(R) File 233:Microcomputer Abstracts

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00448031 97CW01-111

Tax software vendors compete against IRS -- Electronic filing

Weston, Randy

Computerworld , January 13, 1997 , v31 n2 p45-46, 2 Page(s)

ISSN: 0010-4841

Reports that several software vendors are releasing new client-server applications that will help businesses meet Federal **electronic tax filing** requirements, though the Internal Revenue Service offers similar software for free. Presents some of the requirements for **tax-filing electronically**, indicating that by companies with employment tax deposits of more than \$20,000 must make **electronic payments**. Says that there does indeed appear to a market for this kind of software. Mentions several vendors and their products. (bjp)

18/7/21 (Item 3 from file: 233)

DIALOG(R) File 233:Microcomputer Abstracts

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/00379603 95CZ03-040

Make April 15 less taxing -- TurboTax finds deductions even accountants miss

Middleton, Timothy

Computer Life , March 1, 1995 , v2 n3 p159-162, 3 Page(s)

ISSN: 1076-9862

Company Name: Intuit

Product Name: TurboTax; MacInTax

Presents a favorable review of TurboTax (\$69 Windows and DOS floppy disk; \$70 Windows CD-ROM; \$69 as MacInTax on floppy disk for Macintosh), tax preparation software from Intuit (800, 602). Says that TurboTax

supports data importation from personal finance software and provides an illuminating ~~information gathering~~ interview. The program also calculates the return and analyzes the completed return for mistakes and raises potential audit flags. State **tax preparation** is available, in addition to **electronic filing**. TurboTax also uninstalls itself when the return is completed. Says that TurboTax prompts the user to find money-saving deductions that many **tax** accountants miss. Notes one significant problem with the way the program calculated a **tax-exempt** contribution to a Simplified Employee Pension IRA. Concludes that TurboTax is efficient. Contains two screen displays. (HHW)

18/7/22 (Item 4 from file: 233)

DIALOG(R)File 233:Microcomputer Abstracts  
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00306693 93PWQ3-045

**AM-Tax**

Wise, Naomi; Melville, Richard  
PC World, March 1, 1993, v11 n3 p165, 1 Page(s)  
ISSN: 0737-8939

Company Name: AM Software

Product Name: AM Tax

Presents a mixed review of AM-Tax (\$40-\$70), a personal **tax** preparation program from AM Software (816). The program has an austere interface and on-line help is restricted to only program instructions. In the test scenario, the program erased the amount of **tax** withheld whenever it performed recalculation and would not allow separate entries of estimated **tax payments** and withholding. The program offers state modules for 22 states. **Electronic filing** is an option only in the higher-priced Professional version of the program. The program offers no final audit option. Includes one screen display. (djd)

✓ 18/7/23 (Item 5 from file: 233)

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00251392 91PX10-015

**TurboTax 8.0**

Schlessman, Robert  
PCM, October 1, 1991, v9 n4 p81-82, 2 Page(s)  
ISSN: 0747-0460

Company Name: ChipSoft

Product Name: TurboTax

Presents a very favorable review of TurboTax 8.0 (\\$75), a **tax** preparation package from ChipSoft, San Diego, CA (619). The program requires 512K RAM, two floppy drives (or one floppy and a hard drive), and DOS 2.0 or later. The program is very easy to learn and use. Based on an initial interview, the program selects the forms and schedules the user's return will require. Data entered on more than one form or schedule is automatically transferred between them after being entered only once. The program provides excellent context-sensitive help and pull-down IRS instructions for each form. It can print IRS-approved forms on most dot-matrix or laser printers, and ChipSoft also offers ChipLink, a package that can be used to electronically file returns with refunds due. The program will allow beginners or experienced users to easily and quickly prepare their **tax** returns. Upgrades cost \\$37.50. Includes one screen display. (djd)

18/7/24 (Item 6 from file: 233)

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00243154 91PX06-004

**Dollars and \$ense**

Halliday, Rowland W

PCM , June 1, 1991 , v8 n12 p62-64, 3 Pages

ISSN: 0747-0460

Company Name: Software Toolworks, The

Product Name: Dollars and Sense

Presents a very favorable review of Dollars and Sense (\$179.95), a financial management program from Software Toolworks, Novato, CA (415). The program requires 256K RAM, DOS 2.1 or later, and a floppy drive. DOS 3.0 and a hard drive or second floppy are recommended. The program can be used to pay bills electronically, to automate recurring bills, to prepare tax estimates, and to manage up to 10 investment portfolios. A single transaction can be made to affect up to 14 accounts. The program is easy to set up, all accounts are entered through menus. A set of accounts for a fictional family are included on disk to demonstrate the use of the program. The documentation is complete with step-by-step instructions for setting up the required accounts as well as figures of menu screens that will appear. Once accounts are set up "keeping track of your finances is uncomplicated." (djd)

18/7/25 (Item 7 from file: 233)

DIALOG(R) File 233:Microcomputer Abstracts

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00236441 91PI03-074

**MacInTax for Windows**

Meadows, Laura Lou

PC Magazine , March 12, 1991 , v10 n5 p478, 481, 2 Pages

ISSN: 0888-8507

Presents a favorable review of MacInTax for Windows (\$99, state programs \$69), a tax preparation program from Softview Inc., Oxnard, CA (805). The program requires Windows 3.0 and a mouse. At least a 386SX processor is recommended. It provides an interview module to assist in selecting forms required. Supporting forms may be completed as they are selected or by double-clicking on the appropriate line of Form 1040. Double-clicking on an entry description brings up an instruction window. The program requires manual intervention to apply limits in some instances (nearly all tax prep packages do this automatically) and does not allow overriding a field that it calculates (which most programs do) includes a print spooler and downloadable soft fonts, support for electronic filing, and the ability to apply for a refund anticipation loan. It provides WYSIWYG screens and terrific output. Includes one screen display. (djd)

18/7/26 (Item 8 from file: 233)

DIALOG(R) File 233:Microcomputer Abstracts

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00210363 90BY02-038

**Two for Uncle Sam**

BYTE , February 1, 1990 , v15 n2 p68, 1 Pages

ISSN: 0360-5280

Reports that ChipSoft of San Diego, CA (619) has released TurboTax (\$75), a tax preparation program that links state versions of the program (\$40 each). Also reports that Softview of Oxnard, CA (805) has released MacInTax (\$99) for a Mac 512KE or higher and MacInTax for Windows (\$99) for IBM PC AT with 640K, tax preparation programs that can be filed electronically (\$39.95 refund within three days; \$29.95 refund in normal amount of time). (jb)

18/7/27 (Item 9 from file: 233)

DIALOG(R) File 233:Microcomputer Abstracts

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00204589 89LK11-010

Online solutions to taxing problems Using the modem can help when dealing with Uncle Sam

Ojala, Marydee

LINK-UP , November 1, 1989 , v6 n6 p12-14, 31, 4 Pages

ISSN: 0073-9988

Presents a discussion of the use of online information systems to assist with income tax preparation. Lists several full-text databases which can be accessed for tax advice as well as a number of tax newsletter databases. Mentions four online service which can be accessed for reviews of tax preparation software, and points out that freeware and shareware are often available through GENie and CompuServe. Includes a discussion of electronic filing , which can speed receipt of refunds and also can eliminate mathematical errors which may occur when filing a paper return. Includes one illustration. (djd)

18/7/28 (Item 10 from file: 233)

DIALOG(R) File 233:Microcomputer Abstracts

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00193143 89CR05-021

Internal Revenue Service gets electronic boost with returns

Doyle, T C

Computer Reseller News , May 1, 1989 , n313 p97, 102, 2 Pages

ISSN: 0893-8377

Discusses the continuing expansion of the electronic return filing service via high speed modems being offered by the Internal Revenue Service, particularly these days when the technology behind the system is rapidly improving. Says that the system is beginning to pay dividends for the Service by improving both the accuracy and speed of returns processing thus saving the agency thousands of dollars. Also says that filers take to electronic filing of tax returns even though the IRS requires the filers to pay the heavy premiums for high-speed modems. Adds that 36 states and 43 filing districts are now connected to the system. Also mentions the peripheral businesses that sprouted such as tax preparation franchises, to complement the automated IRS service. Contains one illustration. (rge)

18/7/29 (Item 11 from file: 233)

DIALOG(R) File 233:Microcomputer Abstracts

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00192868 89LK05-030

GENie to feature online tax filing

LINK-UP , May 1, 1989 , v6 n3 p33, 1 Pages

ISSN: 0073-9988

Reports that the GENie of Rockville, MD (800) has signed an agreement with ELF Communications of Redwood City, CA (800) which will enable GENie to offer subscribers expecting a tax refund the ability to electronically file their individual returns with the IRS. Says that various tax information and forms will also be made available for downloading. ELF and GENie anticipate that this service will be ready in January 1989. Each online return will cost approximately \$12.50, plus GENie access charges. (irl)

18/7/30 (Item 12 from file: 233)

DIALOG(R) File 233:Microcomputer Abstracts

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00184084 89IT01-011

Taxpayers benefit from electronic filing

Information Today , January 1, 1989 , v6 n1 p7-8

Describes two electronic income tax filing services. CompuServe of Columbus, OH (614) offers Rapid Refund (\$NA), a service developed by CompuServe's parent company, H&R Block; and GE Information Services of Rockville, MD (301) has signed an agreement with ELF Communications which lets ELF use GE's BusinessTalk communications service to transmit tax returns for tax preparers using ELF's ELF/MATE, ELF/LINK, and other products. Says ELF will offer the BusinessTalk-based system to tax

preparers in both IBM and Mac formats. (bs)

18/7/31 (Item 1 from file: 238)  
DIALOG(R) File 238:Abs. in New Tech & Eng.  
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0310363 ANTE NUMBER: 73924  
**Doing business in the Internet age**  
JOURNAL: Business Week 22 Jun 1998 p.61-6, 68-74, 76-89. il.  
PUBLICATION YEAR: 1998  
ISSN: 0007-7135  
LANGUAGE: English

ABSTRACT: This report about doing business on the Internet is divided into four sections: the overview, which looks at the business explosion on the Net having an effect beyond the digital world, and the benefits to the economy of E-commerce; business at Net speed, which has articles on a number of aspects of doing business on the Net, for example, how safe is the Net and partnerships on the Net; the digital bazaar, which looks at what makes a successful cybermerchant, Net's perils, E -cash, America's tax policy for stores, mail order and online, and smart cards; and finally, surviving the Internet, which discusses that in an era where information is a commodity, the companies that prosper will be those that can use the Net to harness their know-how to competitive advantage..

18/7/32 (Item 1 from file: 139)  
DIALOG(R) File 139:Econ. Lit. Index  
(c) 1999 American Economic Association. All rts. reserv.

489603  
**TITLE: Migration of Corporate Payments from Check to Electronic Format:  
A Report on the Current Status of Payments**  
AUTHOR(S): Phillips, Aaron L.  
AUTHOR(S) AFFILIATION: Treasury Management Assn  
JOURNAL NAME: Financial Management,  
JOURNAL VOLUME & ISSUE: 27 4,  
PAGES: 92-105  
PUBLICATION DATE: Winter 1998  
AVAILABILITY: <A HREF="http://www.fma.org/index.htm">Publisher's URL</A>  
ISSN: 0046-3892  
DOCUMENT TYPE: Journal Article  
ABSTRACT: The Treasury Management Association (TMA) conducted a survey early in 1998 to identify the barriers to, benefits of, and incentives for converting corporate paper check payments to electronic forms (ACH and EDI). The results reveal federal and state mandates (e.g., for tax payments) to be the most common incentives for organizations to adopt electronic payments. The biggest barriers to further expansion is lack of vendor (trading-partner) capability to receive electronic payment accompanied by remittance information, lack of systems integration and costs of additional technology. The most important benefits are lower costs, certainty of payment date, and improved cash-flow projections.

?

The report continues the work initiated last year with the release in July of 1997 of the Administration's 'A Framework for Global Electronic Commerce.' The Framework established a set of principles and policies that together provide a new vision for commerce in the digital age--guidelines that strive to protect the public interest while liberating private enterprise from unnecessary regulations that would stifle innovation. The report describes the Administration's progress in implementing the strategy and presents five new areas of focus for the future.

18/7/14 (Item 2 from file: 6)

DIALOG(R)File 6:NTIS  
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1926411 NTIS Accession Number: PB96-128012

**Federal Financial Management Status Report and Five-Year Plan, July 1995**

Office of Management and Budget, Washington, DC.

Corp. Source Codes: 012565000

Report No.: ISBN-0-16-048266-6

Jul 95 64p

Languages: English

Journal Announcement: GRAI9605

Also available from Supt. of Docs. See also report dated Aug 93,  
PB96-110234.

Order this product from NTIS by: phone at 1-800-553-NTIS (U.S. customers); (703) 605-6000 (other countries); fax at (703) 321-8547; and email at orders@ntis.fedworld.gov. NTIS is located at 5285 Port Royal Road, Springfield, VA, 22161, USA.

NTIS Prices: PC A04/MF A01

Country of Publication: United States

The Office of Management and Budget (OMB) is pleased to submit the 1995 Federal Financial Management Status Report and Five-Year Plan. This document, which is prepared pursuant to the Chief Financial Officers (CFOs) Act of 1990, is OMB's fourth annual report on government-wide efforts to improve financial management performance. The CFOs Act provides important tools to run government better and to restore the public's confidence in government. This year's report describes the priorities that the CFO Council and OMB have established to achieve their financial management goals. They include improving financial management systems, effectively implementing the Government Performance and Results Act, issuing comprehensive government accounting standards, developing agency-wide audited financial statements, developing a quality financial management workforce, improving tax and debt collection, making management more accountable through performance reporting, facilitating electronic payments, and improving the administration of Federal grants.

18/7/15 (Item 3 from file: 6)

DIALOG(R)File 6:NTIS  
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1536100 NTIS Accession Number: PB90-274051

**Fiscal Year 1989 Program Report: Maine Environmental Studies Center**

White, G. K.

Maine Univ. at Orono. Environmental Studies Center.

Corp. Source Codes: 050804005

Sponsor: Geological Survey, Reston, VA. Water Resources Div.

Report No.: USGS/G-1566-02

Jul 90 32p

Languages: English

Journal Announcement: GRAI9024

See also report for 1988, PB90-165168. Sponsored by Geological Survey, Reston, VA. Water Resources Div.

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NTIS Prices: PC A03/MF A01

Journal: Computers in Banking vol.7, no.5 p.12, 14, 20

Publication Date: May 1990 Country of Publication: USA

CODEN: CBANE6 ISSN: 0735-6496

Language: English Document Type: Journal Paper (JP)

Treatment: Practical (P)

Abstract: With the 1990 tax season over, how well has the Internal Revenue Service's **Electronic Filing** System (EFS) performed? IRS claims of **refunds** being directly deposited to bank accounts in as little as three days from the time the form is filed are at best exaggerated. Bankers say a three- to five-week turn-around is closer to the truth. System outages at IRS centers, networking problems, lost **computer** tapes, and human **filing** errors, have all contributed to the longer turnaround. Nevertheless, despite the apparent problems, EFS's popularity continues to increase. The number of returns **filed electronically** has increased from 25000 to 1.2 million in four years. (0 Refs)

18/7/12 (Item 12 from file: 2)

DIALOG(R)File 2:INSPEC

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03641830 INSPEC Abstract Number: D90001526

Title: **Faster refund drive automation of tax preparation: the sooner you file . .**

Author(s): Garvey, M.

Journal: InformationWEEK no.265 p.21, 24

Publication Date: 9 April 1990 Country of Publication: USA

CODEN: INFWE4 ISSN: 8750-6874

Language: English Document Type: Journal Paper (JP)

Treatment: Applications (A); Practical (P)

Abstract: Quick and early **refunds** are a felicitous by-product of the Internal Revenue Service's movement toward **electronic filing** of returns. In turn, **electronic filing** has posed new challenges to **tax** preparers, who are ferociously competing to offer the fastest turnaround. These firms are targeting a large number of American taxpayers-more than 70% are eligible for a **refund**. **Rapid Refund** is the name used by H&R Block Inc. for its **electronic filing** service. Its current configuration consists of a cluster of six DEC VAX machines-a 6000-410 and five 8550s-of which two serve as backup. This cluster serves as the central hub for 750 Block offices nationwide, the IRS's three electronic transmission centers, and three banks participating Block field offices work with IBM PS/2 Model 30s, and more recently, Model 1000 TL PCs from Tandy Corp. The Rapid Refund PC frontend program logs on to the network and processes the data entry, freeing the central hub for communication to the IRS. Block differs from some competitors in that the actual **tax** preparation is still done manually-only some processing and transmission is automated. (0 Refs)

18/7/13 (Item 1 from file: 6)

DIALOG(R)File 6:NTIS

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2103073 NTIS Accession Number: PB99-105496/XAB

**U.S. Government Working Group on Electronic Commerce. Annual Report (1st), November 1998**

Executive Office of the President, Washington, DC. The White House Office.

Corp. Source Codes: 013719036

Nov 98 39p

Languages: English

Journal Announcement: GRAI9904

See also PB97-191258, PB98-137011, and PB98-137029.

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NTIS Prices: PC A04/MF A01

Country of Publication: United States

Country of Publication: United States

Contract No.: DI-14-08-0001-G-1566

Phosphorus Availability from Woodash' compared P availability from fertilizer relative to woodash as a source. Results indicate that the standard Maine soil testing extractant may not sensitively assess plant availability of P in woodash-amended soils. 'Preliminary Evaluation of Natural Controlling Factors for the Sensitivity of Maine Lakes to Phosphorus Loading' has begun **assembling** existing data to determine whether causal factors can be identified which allow prediction of vulnerable lakes prior to the onset of eutrophication. Preliminary results from 'The Efficiency of Constructed Wetland-Pond Systems in Reducing Sediment and Nutrient Discharges from Agricultural Watersheds' suggest that wetland-pond systems designed to reduce sediment and nutrient runoff from agricultural land are very effective. Ninety percent or more of the incoming phosphorus and suspended solid mass were retained by the system during two storm events. 'Impacts of Landspreading Wastes on Vadose Water Quality' has evaluated preliminary data from plots spread with papermill sludge. Initial results suggest reason for concern that the sludge may contribute to the deterioration of subsurface water quality. 'Organizing Information for Improved Groundwater Management' **reports** progress on procedures and **computer** algorithms to geocode wells and underground storage tanks using community **tax** base maps and Census Bureau data.

18/7/16 (Item 4 from file: 6)

DIALOG(R) File 6:NTIS

Comp&distr 1998 NTIS, Intl Copyright All Righ. All rts. reserv.

1485120 NTIS Accession Number: DE89635278

**Alive Searches as Complementing Death Searches in the Epidemiological Follow-Up of Ontario Miners**

Fair, M. E. ; Newcombe, H. B. ; Lalonde, P. ; Poliquin, C.

Atomic Energy Control Board, Ottawa (Ontario).

Corp. Source Codes: 003407000; 0629000

Report No.: INFO-0266

Feb 88 47p

Languages: English

Journal Announcement: GRAI9008

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NTIS Prices: PC A03/MF A01

Country of Publication: Canada

'Alive' searches have been used to complement the 'death' searches, in a study of the mortality experience of a cohort of Ontario miners. The purpose has been to develop a way of distinguishing between those cohort members who are 'confirmed' alive at a given time, and those who are 'lost to follow-up'. A total of 30,000 Workers' Compensation Board (WCB) records with valid Social Insurance Numbers (SIN) were used to search the income **tax** files by **computer** over two consecutive years (1977 and 1978) representing nearly 27 million **tax** returns. These **tax** file searches using SIN numbers have provided information on the procedures to be used in, and likely success of, the corresponding searches of the **tax** files that could be carried out where the SIN number is not available on the work records. The latter kind of search would have to be based on names, birth dates and such, and would be probabilistic in nature. The results of the study were as follows: After the initial death search, it was found that 7.5% of the cohort had died in Canada and their records were found on the Mortality Data Base. The remaining 92.5% has been 'assumed alive' in the earlier analysis. After the 'alive' follow-up using the income **tax** file, one was able to confirm that 89.1% of the 'assumed alive' had filed an income **tax** after the study period. Thus only 3.4% of the cohort remained untraced. Among those there could be an admixture of deaths outside of Canada, persons who have moved outside of Canada and are still alive, and/or persons alive within Canada, but who have not filed an income **tax** return. This study has indicated that the procedures developed are useful for purposes of 'alive' follow-up, for evaluation of the quality of the

Mortality Data Base-cohort death file searches, for improving the accuracy of analytical results of epidemiological studies, and for reducing the cost and labor of resolving doubtful death searches. (At index citation 20:063864)

18/7/17 (Item 5 from file: 6)

DIALOG(R)File 6:NTIS

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0475620 NTIS Accession Number: N74-34790/7/XAB

**Use of Remote Sensing Techniques for Inventorying and Planning Utilization of Land Resources in South Dakota**

(Annual Progress Report, Jul. 1973 - Jun. 1974)

Myers, V. I. ; Frazee, C. J. ; Rusche, A. E. ; Moore, D. G. ; Nelson, G.

Department of

South-Dakota State Univ., Brookings. Remote Sensing Inst.

Report No.: NASA-CR-140574; SDSU-RSI-74-08

Jun 74 96p

Journal Announcement: GRAI7503; STAR1224

Misc-Original Contains Color Illustrations.

Order this product from NTIS by: phone at 1-800-553-NTIS (U.S. customers); (703)605-6000 (other countries); fax at (703)321-8547; and email at orders@ntis.fedworld.gov. NTIS is located at 5285 Port Royal Road, Springfield, VA, 22161, USA.

NTIS Prices: PC A05/MF A01

Contract No.: NGL-42-003-007

The basic procedures for interpreting remote sensing imagery to rapidly develop general soils and land use inventories were developed and utilized in Pennington County, South Dakota. These procedures and remote sensing data products were illustrated and explained to many user groups, some of whom are interested in obtaining similar data. The general soils data were integrated with land soils data supplied by the county director of equalization to prepare a land value map. A computer print-out of this map indicating a land value for each quarter section is being used in tax reappraisal of Pennington County. The land use data provided the land use planners with the present use of land in Pennington County. Additional uses of remote sensing applications are also discussed including tornado damage assessment, hail damage evaluation, and presentation of soil and land value information on base maps assembled from ERTS-1 imagery. (Author)

18/7/18 (Item 6 from file: 6)

DIALOG(R)File 6:NTIS

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0080345 NTIS Accession Number: AD-603 670/XAB

**A Model of Metropolis**

Lowry, I. S.

Rand Corp Santa Monica Calif

Corp. Source Codes: 8888888888

Report No.: RM-40535-RC

Aug 64 2p

Journal Announcement: USGRDR6501

Order this product from NTIS by: phone at 1-800-553-NTIS (U.S. customers); (703)605-6000 (other countries); fax at (703)321-8547; and email at orders@ntis.fedworld.gov. NTIS is located at 5285 Port Royal Road, Springfield, VA, 22161, USA.

NTIS Prices: PC A02

This report describes a computer model of the spatial organization of human activities within a metropolitan area. The model is intended for eventual use as 1) a device for evaluating the impact of public decisions (e.g., concerning urban renewal, tax policies, land-use controls, transportation investments) on metropolitan form; and 2) a device for predicting changes in metropolitan form which will follow over time as a consequence of currently visible or anticipated changes in key variables such as the pattern of 'basic' employment, the efficiency of the transportation system, or the growth of population. The development of the

model to the stage at which it becomes a practical tool for planning and decision-making will require more time and effort. The first-generation model described in this report has been fitted to data for Pittsburgh, Pennsylvania, and enough experimental computer-runs have been completed to allow an appraisal of the practicability of my approach, and to indicate the strong and weak points of the model and also of the available data. The findings reported here offer guidance both to the development of a second-generation model and to data collection programs. (Author)

18/7/19 (Item 1 from file: 233)  
DIALOG(R)File 233:Microcomputer Abstracts  
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00474070 97SN10-006

Uncle Sam wants you! to stop writing those checks -- The government is undertaking a massive campaign to persuade businesses to send and receive payments electronically. But the...

Dash, Julekha  
Software Magazine , October 1, 1997 , v17 n11 p69-71, 3 Page(s)  
ISSN: 0897-8085

Reports that the Electronic Federal Tax Payment System (EFTPS) is intended to lead to the eventual replacement of paper checks with electronic payments . Explains the initiative is designed to minimize fraud and lower the costs of cutting and clearing checks. States companies with employment tax deposits exceeding \$50,000 will be required by the Internal Revenue Service to pay their federal taxes electronically starting July 1, 1998, and that by January 1, 1999, companies with tax deposits exceeding \$20,000 will be required to comply with EFTPS. Also says EFTPS requires all companies to receive payment from the federal government electronically by January 1, 1999. Includes pie chart set, a diagram, and a sidebar. (dpm)

18/7/20 (Item 2 from file: 233)  
DIALOG(R)File 233:Microcomputer Abstracts  
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00448031 97CW01-111

Tax software vendors compete against IRS -- Electronic filing  
Weston, Randy  
Computerworld , January 13, 1997 , v31 n2 p45-46, 2 Page(s)  
ISSN: 0010-4841

Reports that several software vendors are releasing new client-server applications that will help businesses meet Federal electronic tax filing requirements, though the Internal Revenue Service offers similar software for free. Presents some of the requirements for tax -filing electronically , indicating that by companies with employment tax deposits of more than \$20,000 must make electronic payments . Says that there does indeed appear to a market for this kind of software. Mentions several vendors a their products. (bjp)

18/7/21 (Item 3 from file: 233)  
DIALOG(R)File 233:Microcomputer Abstracts  
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00379603 95CZ03-040

Make April 15 less taxing -- TurboTax finds deductions even accountants miss

Middleton, Timothy  
Computer Life , March 1, 1995 , v2 n3 p159-162, 3 Page(s)  
ISSN: 1076-9862

Company Name: Intuit  
Product Name: TurboTax; MacInTax  
Presents a favorable review of TurboTax (\$69 Windows and DOS floppy disk; \$70 Windows CD-ROM; \$69 as MacInTax on floppy disk for Macintosh), tax preparation software from Intuit (800, 602). Says that TurboTax

supports data importation from personal finance software and provides an illuminating information-gathering interview. The program also calculates the return & analyzes the completed return for mistakes and raises potential audit flags. State tax preparation is available, in addition to electronic filing. TurboTax also uninstalls itself when the return is completed. Says that TurboTax prompts the user to find money-saving deductions that many tax accountants miss. Notes one significant problem with the way the program calculated a tax-exempt contribution to a Simplified Employee Pension IRA. Concludes that TurboTax is efficient. Contains two screen displays. (HHW)

18/7/22 (Item 4 from file: 233)  
DIALOG(R)File 233:Microcomputer Abstracts  
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00306693 93PW03-045

**AM-Tax**

Wise, Naomi; Melville, Richard  
PC World , March 1, 1993 , v11 n3 p165, 1 Page(s)  
ISSN: 0737-8939  
Company Name: AM Software  
Product Name: AM Tax

Presents a mixed review of AM-Tax (\$40-\$70), a personal tax preparation program from AM Software (816). The program has an austere interface and on-line help is restricted to only program instructions. In the test scenario, the program erased the amount of tax withheld whenever it performed recalculation and would not allow separate entries of estimated tax payments and withholding. The program offers state modules for 22 states. Electronic filing is an option only in the higher-priced Professional version of the program. The program offers no final audit option. Includes one screen display. (djd)

18/7/23 (Item 5 from file: 233)  
DIALOG(R)File 233:Microcomputer Abstracts  
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00251392 91PX10-015

**TurboTax 8.0**

Schlessman, Robert  
PCM , October 1, 1991 , v9 n4 p81-82, 2 Page(s)  
ISSN: 0747-0460  
Company Name: ChipSoft  
Product Name: TurboTax

Presents a very favorable review of TurboTax 8.0 (\\$75), a tax preparation package from ChipSoft, San Diego, CA (619). The program requires 512K RAM, two floppy drives (or one floppy and a hard drive), and DOS 2.0 or later. The program is very easy to learn and use. Based on an initial interview, the program selects the forms and schedules the user's return will require. Data entered on more than one form or schedule is automatically transferred between them after being entered only once. The program provides excellent context-sensitive help and pull-down IRS instructions for each form. It can print IRS-approved forms on most dot-matrix or laser printers, and ChipSoft also offers ChipLink, a package that can be used to electronically file returns with refunds due. The program will allow beginners or experienced users to easily and quickly prepare their tax returns. Upgrades cost \\$37.50. Includes one screen display. (djd)

18/7/24 (Item 6 from file: 233)  
DIALOG(R)File 233:Microcomputer Abstracts  
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00243154 91PX06-004

**Dollars and \$ense**

Halliday, Rowland W

PCM , June 1, 1991 , v8 n12 p62-64, 3 Pages

ISSN: 0747-0460

Company Name: Software Toolworks, The

Product Name: Dollars and \$ense

Presents a very favorable review of Dollars and \$ense (\$179.95), a financial management program from Software Toolworks, Novato, CA (415). The program requires 256K RAM, DOS 2.1 or later, and a floppy drive. DOS 3.0 and a hard drive or second floppy are recommended. The program can be used to **pay bills electronically**, to **automate** recurring bills, to **prepare tax** estimates, and to manage up to 10 investment portfolios. A single transaction can be made to affect up to 14 accounts. The program is easy to set up, all accounts are entered through menus. A set of accounts for a fictional family are included on disk to demonstrate the use of the program. The documentation is complete with step-by-step instructions for setting up the required accounts as well as figures of menu screens that will appear. Once accounts are set up "keeping track of your finances is uncomplicated." (djd)

18/7/25 (Item 7 from file: 233)

DIALOG(R)File 233:Microcomputer Abstracts

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00236441 91PI03-074

**MacInTax for Windows**

Meadows, Laura Lou

PC Magazine , March 12, 1991 , v10 n5 p478, 481, 2 Pages

ISSN: 0888-8507

Presents a favorable review of MacInTax for Windows (\$99, state programs \$69), a **tax preparation** program from Softview Inc., Oxnard, CA (805). The program requires Windows 3.0 and a mouse. At least a 386SX processor is recommended. It provides an interview module to assist in selecting forms required. Supporting forms may be completed as they are selected or by double-clicking on the appropriate line of Form 1040. Double-clicking on an entry description brings up an instruction window. The program requires manual intervention to apply limits in some instances (nearly all **tax prep** packages do this automatically) and does not allow overriding a field that it calculates. (which most programs do) includes a print spooler and downloadable soft fonts, support for **electronic filing**, and the ability to apply for a **refund** anticipation loan. It provides WYSIWYG screens and terrific output. Includes one screen display. (djd)

18/7/26 (Item 8 from file: 233)

DIALOG(R)File 233:Microcomputer Abstracts

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00210363 90BY02-038

**Two for Uncle Sam**

BYTE , February 1, 1990 , v15 n2 p68, 1 Pages

ISSN: 0360-5280

Reports that ChipSoft of San Diego, CA (619) has released TurboTax (\$75), a **tax preparation** program that links state versions of the program (\$40 each). Also reports that Softview of Oxnard, CA (805) has released MacInTax (\$99) for a Mac 512KE or higher and MacInTax for Windows (\$99) for IBM PC AT with 640K, **tax preparation** programs that can be filed **electronically** (\$39.95 **refund** within three days; \$29.95 **refund** in normal amount of time). (jb)

18/7/27 (Item 9 from file: 233)

DIALOG(R)File 233:Microcomputer Abstracts

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00204589 89LK11-010

**Online solutions to taxing problems Using the modem can help when dealing with Uncle Sam**

Ojala, Marydee

LINK-UP , November 1, 1989 , v6 n6 p12-14, 31, 4 Pages

ISSN: 0073-9988

Presents a discussion [REDACTED] the use of online information [REDACTED] items to assist with income **tax** preparation. Lists several full-text databases which can be accessed for **tax** advice as well as a number of **tax** newsletter databases. Mentions four online service which can be accessed for reviews of **tax** preparation software, and points out that freeware and shareware are often available through GENIE and CompuServe. Includes a discussion of **electronic filing**, which can speed receipt of **refunds** and also can eliminate mathematical errors which may occur when filing a paper return. Includes one illustration. (djd)

18/7/28 (Item 10 from file: 233)

DIALOG(R)File 233:Microcomputer Abstracts

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00193143 89CR05-021

**Internal Revenue Service gets electronic boost with returns**

Doyle, T C

Computer Reseller News , May 1, 1989 , n313 p97, 102, 2 Pages

ISSN: 0893-8377

Discusses the continuing expansion of the **electronic return filing** service via high speed modems being offered by the Internal Revenue Service, particularly these days when the technology behind the system is rapidly improving. Says that the system is beginning to pay dividends for the Service by improving both the accuracy and speed of returns processing thus saving the agency thousands of dollars. Also says that filers take to **electronic filing** of **tax** returns even though the IRS requires the filers to **pay** the heavy premiums for high-speed modems. Adds that 36 states and 43 filing districts are now connected to the system. Also mentions the peripheral businesses that sprouted such as tax preparation franchises, to complement the **automated** IRS service. Contains one illustration. (rge)

18/7/29 (Item 11 from file: 233)

DIALOG(R)File 233:Microcomputer Abstracts

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00192868 89LK05-030

**GENie to feature online tax filing**

LINK-UP , May 1, 1989 , v6 n3 p33, 1 Pages

ISSN: 0073-9988

Reports that the GENie of Rockville, MD (800) has signed an agreement with ELF Communications of Redwood City, CA (800) which will enable GENie to offer subscribers expecting a **tax refund** the ability to **electronically file** their individual returns with the IRS. Says that various **tax** information and forms will also be made available for downloading. ELF and GENie anticipate that this service will be ready in January 1989. Each online return will cost approximately \$12.50, plus GENie access charges. (irl)

18/7/30 (Item 12 from file: 233)

DIALOG(R)File 233:Microcomputer Abstracts

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00184084 89IT01-011

**Taxpayers benefit from electronic filing**

Information Today , January 1, 1989 , v6 n1 p7-8

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DIALOG(R)File 238:Abs. in New Tech & Eng.  
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0310363 ANTE NUMBER: 73924  
**Doing business in the Internet age**  
JOURNAL: Business Week 22 Jun 1998 p.61-6, 68-74, 76-89. il.  
PUBLICATION YEAR: 1998  
ISSN: 0007-7135  
LANGUAGE: English

ABSTRACT: This report about doing business on the Internet is divided into four sections: the overview, which looks at the business explosion on the Net having an effect beyond the digital world, and the benefits to the economy of E-commerce; business at Net speed, which has articles on a number of aspects of doing business on the Net, for example, how safe is the Net and partnerships on the Net; the digital bazaar, which looks at what makes a successful cybermerchant, Net's perils, E -cash, America's tax policy for stores, mail order and online, and smart cards; and finally, surviving the Internet, which discusses that in an era where information is a commodity, the companies that prosper will be those that can use the Net to harness their know-how to competitive advantage.

18/7/32 (Item 1 from file: 139)  
DIALOG(R)File 139:Econ. Lit. Index  
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489603  
TITLE: Migration of Corporate Payments from Check to Electronic Format:  
A Report on the Current Status of Payments  
AUTHOR(S): Phillips, Aaron L.  
AUTHOR(S) AFFILIATION: Treasury Management Assn  
JOURNAL NAME: Financial Management,  
JOURNAL VOLUME & ISSUE: 27 4,  
PAGES: 92-105  
PUBLICATION DATE: Winter 1998  
AVAILABILITY: <A HREF="http://www.fma.org/index.htm">Publisher's URL</A>  
ISSN: 0046-3892  
DOCUMENT TYPE: Journal Article

ABSTRACT: The Treasury Management Association (TMA) conducted a survey early in 1998 to identify the barriers to, benefits of, and incentives for converting corporate paper check payments to electronic forms (ACH and EDI). The results reveal federal and state mandates (e.g., for tax payments) to be the most common incentives for organizations to adopt electronic payments. The biggest barriers to further expansion is lack of vendor (trading-partner) capability to receive electronic payment accompanied by remittance information, lack of systems integration and costs of additional technology. The most important benefits are lower costs, certainty of payment date, and improved cash-flow projections.

?

Set	Items	Description
S1	201065	TAX OR TAXES OR INLAND()REVENUE
S2	177685	PREPAR? OR REPORT? OR FILE? ? OR FILING OR (FILL???)IN OR COMPLET?) (3N) (FORM? ? OR RETURN? ? OR DOCUMENT?)
S3	7558	S2(5N) (ELECTRONIC? OR AUTOMATE? OR AUTOMATION OR COMPUTER? OR DIGITAL? OR VIRTUAL OR INTERNET OR ONLINE OR ON()LINE)
S4	54336	COLLECT? OR GATHER? OR COMPIL? OR ASSEMB?
S5	153570	INFORMATION OR DATA OR (BANK? ? OR BROKERAGE? OR INTEREST - OR FINANCIAL OR MORTGAGE OR PAYROLL OR EMPLOYER) (3N)STATEMENT?
S6	4653	(MULTIPLE OR MANY OR DIVERSE OR PLURAL? OR MUTUAL()FUND? "OR INVESTMENT?) (5N)STATEMENT? OR (W2 OR W()2 OR 1099 OR 1098)
S7	3162	CHARIT?(5N) (CONTRIBUTION? OR RECEIPT? OR DONATION?)
S8	3569	EFT OR EFTS OR ELECTRONIC?(1N) FUNDS (1N) TRANSFER? OR (ELECTRONIC OR E OR DIGITAL OR VIRTUAL) () (CASH OR WALLET OR PURSE - OR MONEY ) OR ECASH OR EMONEY OR EPAYMENT?
S9	4551	(PAY? OR REFUND?) (15N) (ELECTRONIC? OR ONLINE OR ON()LINE OR INTERNET)
S10	156774	S5 OR S6 OR S7
S11	6672	S8 OR S9
S12	4	S1(S)S3(S)S4(5N)S10(S)S11
S13	0	(ELECTRONIC? OR AUTOMATE? OR AUTOMATION OR COMPUTER? OR DIGITAL? OR VIRTUAL OR INTERNET OR ONLINE OR ON()LINE) (5N)S16(5-N)S22
S14	42	S1(S)S3(S)S4(5N)S10
S15	38	S14 NOT S12
S16	31	S15 NOT PD=>970508
S17	29	RD (unique items)

?t s12/3,k/all

12/3,K/1  
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00660217

\*\* FULL-TEXT AVAILABLE IN FORMATS 7 AND 9 \*\*

**Tax Executives Institute-Federation of Tax Administrators liaison meeting**

Anonymous  
Tax-Executive v50 n1 PP: 59-64 Jan/Feb 1998  
ISSN: 0040-0025 JRNL CODE: TXE  
WORD COUNT: 5085 LINE COUNT: 462

Accounting and Tax Database\_1971-1999/Aug W5  
...TEXT: FTA project.

VI. State's Perspective on Simplified Tax and Wage Reporting System

Mr. Cherecwich inquired about the States' views on the IRS's Simplified **Tax** and Wage Reporting System (STAWRS). Mr. Duncan explained that the FTA's initial interest was in creating a system for a single point of filing for all W-2 wage and **tax** payroll information. The IRS, he said, has determined that it will not divert its own resources to create the system. Likewise, the Social Security Administration...

... States. Mr. Murphy inquired whether the single-point of filing for all W-2 information remains a goal for the States. Mr. Duncan replied that **electronic filing** of all **payroll** -related information at a single processing point is ultimately the most efficient means of **collecting**, processing, and disseminating the **information**. As a result, the States would like to see such a system established.

Mr. Fuchs inquired whether TEI would support a mandate requiring all worker

...

12/3,K/2

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00605139

\*\* FULL-TEXT AVAILABLE IN FORMATS 7 AND 9 \*\*

**Commissioner calls on more CPAs to file electronically**

Anonymous  
Journal of Accountancy v183 n2 PP: 23-24 Feb 1997  
ISSN: 0021-8448 JRNL CODE: JAC  
WORD COUNT: 502 LINE COUNT: 46

Accounting and Tax Database\_1971-1999/Aug W5

...TEXT: also said that last year over 10 million taxpayers had refunds deposited in their bank accounts and she suggested more businesses promote the direct deposit **refunds**.

(Graph Omitted)

Captioned as: **Taxes States Collect**

More **information** on the various IRS **electronic payment** and **filing** systems is available on the IRS World Wide Web site at <http://www.irs.ustreas.gov>.

12/3,K/3

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00510774

\*\* FULL-TEXT AVAILABLE IN FORMATS 7 AND 9 \*\*

**Electronic tax filing: How's it working?**

Srinivasan, S; Walter, Richard M

National Public Accountant v40 n4 PP: 22-25+ Apr 1995

ISSN: 0027-9978 JRNL CODE: NPA

WORD COUNT: 2663 LINE COUNT: 242

Accounting and Tax Database 1971-1999/Aug W5

...TEXT: software companies work with the IRS to develop the Software needed to file under the EDI system.

#### Summary

The primary selling point of the current **electronic filing** system has been fast **refunds**. This selling point has not appealed to the typical individual **tax** client of accounting firms. Each firm should assess the costs and benefits associated with the adoption of **electronic filing**. In order to **gather information** about EFS and the procedures involved in participating in the program, **tax** practitioners should obtain Publication 1345 from the IRS. Additionally, the IRS provides free EFS informational seminars through its district offices.

The IRS is in the...

**12/3,K/4**

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00276895

**Many Happy Returns**

Bryan, Marvin

Personal Computing v14 n3 PP: 103-110 Mar 20, 1990

ISSN: 0192-5490 JRNL CODE: PSC

Accounting and Tax Database\_1971-1999/Aug W5

**ABSTRACT:** **Tax** software for personal income **tax** returns should incorporate the expertise of a **tax** specialist and identify allowable deductions. These programs also should help organize a return and **assemble information** and help with financial planning by demonstrating the consequences of different personal and business decisions. Seven **tax** return programs were evaluated with the help of Arvai and Associates, an accounting firm that specializes in **tax** matters. **Tax** returns were created for 2 mythical families with different problems. All programs perform math, and many provide explanatory information for each line of the return...

...a format approved by the Internal Revenue Service. If a laser printer is available, many may produce replicas of official federal returns. Some packages support **electronic filing** and can **electronically** deposit a **refund** into a bank account. Support is available for **tax** programs, but from programmers, not **tax** preparers. ...

17/3,K/18

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00232033

**Data Base Reporting**

Spiceland, J. David  
Journal of Accounting & EDP v4 n2 PP: 62-65 Summer 1988  
ISSN: 8756-5714 JRNL CODE: JAD

Accounting and Tax Database\_1971-1999/Aug W5

...ABSTRACT: combined with other technological advances, has made database reporting a more practicable financial reporting process. In fact, 2 major governmental agencies already are moving toward **electronic** database **reporting**. By 1991, the Securities & Exchange Commission's (SEC) electronic **data gathering** and retrieval (EDGAR) system will mandate that companies **file** required forms **electronically**. Documents can be **filed** by diskette, magnetic tape, or direct transmission. When fully operable, EDGAR will make filings available to anyone with a microcomputer. Most of the users participating...

... problems that are yet to be resolved. In 1985, the Internal Revenue Service (IRS) instituted a pilot program that resulted in over one million taxpayers **filing** their 1987 **tax** returns by **computer**. In addition, about 95% of the information returns (Form 1099) were transmitted to the IRS via magnetic media. ...

17/3,K/19

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00209996

**Computers and the Tax Professional**

Throneberry, Mary Beth; Malley, John C.; Wallace, William D.  
National Public Accountant v32 n5 PP: 20-24 May 1987  
ISSN: 0027-9978 JRNL CODE: NPA

Accounting and Tax Database\_1971-1999/Aug W5

ABSTRACT: As microcomputer processing of income tax returns replaces batch processing and timesharing, tax accountants face new responsibilities and decisions. The method of **gathering** clients' **tax** **data** must be selected -- either input sheets, interview sheets, proforma sheets, direct computer input, or computerized communications links. When selecting hardware, the **tax** professional may want to purchase a less expensive microcomputer that can be upgraded later. When selecting software, the **tax** professional should consider the cost, the compatibility with hardware, and whether to purchase or develop the software in-house. To avoid delays in return processing by the Internal Revenue Service, the system's output must be correct. The Internal Revenue Code now provides guidance for **tax** **preparers** who use **computers**. Microcomputers also can be used for **tax** research, **tax** planning, and database retrieval. In a recent questionnaire, **tax** preparers indicated that microcomputers provided significant savings in cost and time. ...

17/3,K/20

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00200310

**Converting Contract Rent to Market Rent/Comments**

Gagnon, Marcel D.; Sauter, Bruce W.  
Property Tax Journal v5 n4 PP: 253-265 Dec 1986  
ISSN: 0731-0285 JRNL CODE: PTJ

Accounting and Tax Database 1971-1999/Aug W5

...ABSTRACT: one and 2 units. The income approach for properties of 3 or more units will be in production in early 1987. A new set of **computer** **filed** data that represents 2 billion characters was completed in 1986. After **data collection**, contract rent modifiers are established in order to standardize all data according to the gross annual rent, including real estate **taxes** and operating expenses, but not the price or value of services, except those connected with the immovable. Two solutions -- premises data analysis and property data...

17/3,K/21

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00198332

**Tax Calculation Software Puts Planning Before Paying**  
Monk, J. Thomas; Landis, Kenneth M.  
Cash Flow v7 n10 PP: 63-64 Oct 1986  
ISSN: 0196-6227 JRNL CODE: CFL

Accounting and Tax Database 1971-1999/Aug W5

ABSTRACT: Corporate **tax** software can perform the routine **data collection** and calculation tasks involved in the 3 phases of the **tax** cycle -- planning, compliance, and **preparation**. During the first phase, **computer** software can provide timely answers to questions regarding the **tax** consequences of various different scenarios. In addition, by balancing workloads, **tax** planning software improves the use of **tax** staffs. Compliance involves the management of a large amount of details. All federal forms and schedules must be completed, and each state has its own compliance procedures. According to Royle Furniss of Amoco Corp., a computerized **tax** system has facilitated the firm's management of compliance work by standardizing procedures. However, more flexibility for unique situations is needed. The job of actual **tax** preparation has been simplified and expedited by the use of laser printers. McDonald's Corp.'s Alan Ringler believes that, despite the advantages of **tax** software, senior **tax** management may have trouble adjusting to the use of computers.

...

17/3,K/22

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00197443

**Return Preparation: Computerized Batch and On-Line Processors Continue to Upgrade Services for Practitioners**

Anonymous  
Journal of Taxation v65 n4 PP: 258-274 Oct 1986  
ISSN: 0022-4863 JRNL CODE: JTX

Accounting and Tax Database 1971-1999/Aug W5

ABSTRACT: Computerized **tax** return processors are offering streamlined data entry and transmission and in-house laser printing. Companies in this field are stressing quality, and many are offering support all year. Comparisons of return processing services and costs include: 1. **data assembly** and **preparation**, 2. **data entry**, 3. **computer** processing, 4. printing and packaging, and 5. review and delivery to the client. There are a number of points and specific areas to be considered in selecting a service bureau for **tax** work, such as the average price of a return in the previous year. With online systems, hardware in the accountant's office is used to transmit data to the service bureau. An annual survey **report** lists charges for **online** systems of various service firms. Descriptions of the services rendered by the companies are included. Tables list the fiduciary, partnership, and corporate returns and the...

17/3,K/23

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X 00195564

**Computerized Batch and On-Line Processors Continue to Upgrade Services for Practitioners**

Anonymous

Taxation for Accountants v37 n3 PP: 158-181 Sep 1986  
ISSN: 0040-0165 JRNL CODE: TFA

Accounting and Tax Database\_1971-1999/Aug W5

**ABSTRACT:** Computerized tax return processors are offering streamlined data entry and transmission and in-house laser printing. Companies in this field are stressing quality and many are offering year-round support. Comparisons of return processing services and costs include: 1. data assembly and preparation, 2. data entry, 3. computer processing, 4. printing and packaging, and 5. review and delivery to the client. In choosing a service bureau, criteria to consider include: 1. turnaround time

... annual survey report with descriptions by the firms themselves of services offered. Services include nonindividual forms as well as those for the individual, and state tax forms are processed as well. Batch processing systems still are available even though online systems continue to improve and become more accessible. ...

17/3,K/24

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00193499

**Filing Government Statements Electronically**

Harper, Robert M., Jr.; Hoffman, Michael J. R.  
Journal of Accounting & EDP v2 n2 PP: 52-56 Summer 1986  
ISSN: 8756-5714 JRNL CODE: JAD

Accounting and Tax Database\_1971-1999/Aug W5

**ABSTRACT:** Many government agencies have taken steps toward greater usage of electronic data processing in the filing process for information returns. Internal Revenue Code (IRC) Section 6011 permits filing 1099s as well as Employers' Quarterly Tax Returns. The possibility of filing income tax returns electronically is being explored by the Internal Revenue Service (IRS). A pilot project for electronic filing is under way. The Securities & Exchange Commission (SEC) also has a voluntary pilot project for the Electronic Data Gathering Analysis and Retrieval (EDGAR) system. EDGAR provides benefits for the SEC, corporations, and investors. While these prospects for filing electronically are promising, it will take the next several years for pilot projects to be completed and general usage authorized. In anticipation of this, accountants should ensure that the software in use is capable of electronic filing .

17/3,K/25

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00166525

**The Use of Microcomputers in Assessment Administration**

Alexander, Jay T.

Property Tax Journal v4 n3 PP: 223-230 Sep 1985  
ISSN: 0731-0285 JRNL CODE: PTJ

Accounting and Tax Database 1971-1999/Aug W5

...ABSTRACT: megabyte hard disks per unit. The micro is employed for most of the administrative programs, along with a Univac system 80 Model 8 mainframe for **tax** billing and the NAL **file**. Software is the program the **computer** uses to carry out its operations. Henrico County uses Tandy's Profile package for most of its administrative programs. Programs formatted from Profile include: 1. Building Permit Control, 2. Appeals, 3. Subdivision and Reassessment Control, 4. Appraisers Work Reports, 5. **Data Collection**, and 6. **Tax** Relief for the Elderly.

17/3,K/26

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00133737

**Software Is Key to In-House Computer Return Preparation as Number of Companies Increases**

Nelson, Robert E.; Langer, Joseph W.  
Taxation for Accountants v31 n4 PP: 246-260 Oct 1983  
ISSN: 0040-0165 JRNL CODE: TFA

Accounting and Tax Database 1971-1999/Aug W5

ABSTRACT: The first step in buying an in-house **computer** to **prepare tax** returns is to select software capable of doing the most sophisticated return. The most sensitive area from the standpoint of staff is probably the choice...

...proforma. The method selected should allow the practitioner and staff to continue, to the greatest extent possible, the same procedures used in prior years in **collecting** client **data** and entering it on income **tax** forms. Data storage must also be considered. Additional software features that deserve consideration are: 1. print options, 2. income **tax** software for partnerships, corporations, and fiduciaries, 3. **computer**-generated input sheets, 4. diagnostic **reports**, 5. client letters, 6. **tax** planning, and 7. depreciation. Once the appropriate software is chosen, the selection of a computer will be greatly circumscribed. A list of software companies is...

17/3,K/27

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00120771

**Prices Up Slightly as Flexibility in Computer-Processed Returns Increases, Companies Dwindle**

Anonymous  
Journal of Taxation v57 n4 PP: 218-226 Oct 1982  
ISSN: 0022-4863 JRNL CODE: JTX

Accounting and Tax Database 1971-1999/Aug W5

ABSTRACT: A survey conducted by The Journal of Taxation **gathered information** regarding prices and services of many companies which **prepare tax** returns by **computer**. The survey focused on the batch and online systems. Although the dominance of the batch system is declining, there is still resistance to in-house...

... The online system utilizes a terminal in the practitioner's office for transmitting information; in-house control is thereby maintained. Federal corporate and partnership income **tax** forms can be **prepared** by **computer** by some companies, although very few offer corporate online systems. ...

17/3,K/28

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00073331

**The Promise of Personal Comp Computing**

Dunn, Thomas J.; Skolnick, Joel H.

Massachusetts CPA Review v53 n6 PP: 25-28 Nov/Dec 1979

ISSN: 0025-4770 JRNL CODE: MCP

Accounting and Tax Database\_1971-1999/Aug W5

...ABSTRACT: only by their low cost hardware but by the affordable software packages now on the market. These personal computers can be used to establish a **data** base management system which **collects**, maintains, changes, deletes, and sorts **information** as well as printing out reports of selected information. CPAs can use this information to establish a client information file or a **tax file**. The personal **computer** can, within seconds, perform detailed calculations necessitated by changes on spreadsheets. If a typewriter is added to the microprocessor system, it becomes a word processing...

17/3,K/29

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00060183

**Metropolitan Area Avoids "Government by Crisis"**

Industrial Engineering v10 n4 PP: 33-34 April 1978

ISSN: 0019-8234 JRNL CODE: INE

Accounting and Tax Database\_1971-1999/Aug W5

...ABSTRACT: County to eliminate the costly duplication of services of city and county residents. This consolidation has been particularly successful with regard to the use of **data** processing in the **tax collection** function. An on-line **tax** collection system controls collecting and doling out **tax** funds. Collections are taken in by multiple Burroughs terminal computers and a CRT. Transactions are then processed in files, and daily collection and disbursement **reports** are generated. This **on-line tax** system is responsible for 20 major and 65 minor types of **taxes**. A Domestic Relations module also handles accounting for alimony and support payments handled by the **tax** collector. Fewer errors are now made, and delinquent notices are kept track of and mailed out with payment checks.

?

17/3,K/1

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00617345

\*\* FULL-TEXT AVAILABLE IN FORMATS 7 AND 9 \*\*

**WSATA Conference sets course for New West**

Anonymous

State Tax Review v57 n43 PP: 12-16 Oct 21, 1996

ISSN: 0162-1750 JRNL CODE: ASTR

WORD COUNT: 4101 LINE COUNT: 373

Accounting and Tax Database\_1971-1999/Aug W5

...TEXT: and Administration

Conference panels examined a variety of issues relating to taxpayer services and administration, including the sharing of performance data, retrieving and processing bankruptcy **information**, **electronically filing** returns, **collecting** non-**tax** debt, and using alternative dispute resolution.

Shared Performance Data

John Strombeck of the Colorado Department of Revenue addressed the issue of shared performance data. State...

17/3,K/2

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00605651

**State tax information on the World Wide Web**

Schmidt, Dennis R; Spindle, Roxanne M; Yancey, William F

Journal of State Taxation v15 n3 PP: 60-66 Winter 1997

ISSN: 0744-6713 JRNL CODE: AJST

Accounting and Tax Database\_1971-1999/Aug W5

...ABSTRACT: present time, all 50 states maintain some presence on the World Wide Web. Currently, at least 40 states sponsor a Web site for their revenue **collection** agencies. Finding **information** on resources related to state **taxes** can be very time consuming. Fortunately, several individuals and organizations have developed comprehensive directories that steer users to the information they seek. Twenty-eight of the state government Web sites currently allow users to download at least some **tax** forms and materials. None of the states appear to be currently offering **electronic filing** through the **Internet**.

17/3,K/3

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00604534

\*\* FULL-TEXT AVAILABLE IN FORMATS 7 AND 9 \*\*

**Rev. Proc. 96-62**

Anonymous

United States. Internal Revenue Service. Internal Revenue Bulletin

n1996-53 PP: 38-46 Dec 30, 1996

ISSN: 0020-5761 JRNL CODE: AIRB

WORD COUNT: 7884 LINE COUNT: 717

Accounting and Tax Database\_1971-1999/Aug W5

...TEXT: and 11 of the revenue procedure. This information is required by the IRS to implement the On-Line Filing Program and to enable taxpayers to **file** their individual income **tax** returns **electronically** through the

On -Line Filing Program. The information will be used to ensure that taxpayers receive accurate and essential information regarding the filing of their return through the OnLine Filing Program and identify the persons involved in the filing of a return through the On -Line Filing Program. The collections of information are required to retain the benefit of participating in the On -Line Filing Program. The likely respondents are business or other for-profit institutions. The estimated total annual reporting and recordkeeping burden is 5,919 hours.

The estimated...

**17/3,K/4**

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00604533

\*\* FULL-TEXT AVAILABLE IN FORMATS 7 AND 9 \*\*

**Rev. Proc. 96-61**

Anonymous  
United States. Internal Revenue Service. Internal Revenue Bulletin n1996-53 PP: 27-38 Dec 30, 1996  
ISSN: 0020-5761 JRNL CODE: AIRB  
WORD COUNT: 11321 LINE COUNT: 1,029

Accounting and Tax Database\_1971-1999/Aug W5  
...TEXT: revenue procedure are in sections 5, 8, 9, and 12. This information is required to implement the Electronic Filing Program and to enable taxpayers to file their individual income tax returns electronically . The information will be used to ensure that taxpayers receive accurate and essential information regarding the filing of their electronic returns and to identify the persons involved in the filing of electronic returns. The collections of information are required to retain the benefit of participating in the Electronic Filing Program. The likely respondents are business or other forprofit institutions.

The estimated total annual reporting and recordkeeping burden is 1,146,272 hours.

The estimated...

**17/3,K/5**

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00591914

**Israeli Warrant Names Murdoch**

Anonymous  
New York Times PP: D, 8:4 Oct 21, 1996  
ISSN: 0362-4331 JRNL CODE: NY

Accounting and Tax Database\_1971-1999/Aug W5

ABSTRACT: Israeli tax officials on Oct 20, 1996 raided a high-technology company that is controlled by Rupert Murdoch, confiscating files and computer data to gather evidence in what they called a \$150 million tax evasion case. A statement from the company, News Datacom Research Ltd, said the charges were without merit. A warrant named Murdoch as well as the...

**17/3,K/6**

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00591075

Murdoch's company in Israel is searched for evidence in case  
Wall Street Journal PP: B 14A:4 Oct 21, 1996  
ISSN: 0099-9660 JRNL CODE: WSJ

Accounting and Tax Database\_1971-1999/Aug W5

ABSTRACT: Israeli **tax** officials raided News Datacom Research Ltd, a high-technology company owned by media magnate Rupert Murdoch, confiscating **files** and **computer** data to **gather** evidence in an alleged \$150 million **tax**-evasion case.

17/3,K/7

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00578097

\*\* FULL-TEXT AVAILABLE IN FORMATS 7 AND 9 \*\*

**Tax Executives Institute-Internal Revenue Service liaison meeting**

Anonymous

Tax Executive v48 n3 PP: 196-201+ May/Jun 1996

ISSN: 0040-0025 JRNL CODE: TXE

WORD COUNT: 5344 LINE COUNT: 486

Accounting and Tax Database\_1971-1999/Aug W5

...TEXT: initiatives has been postponed until after January 1 to permit the IRS task force to provide a more focused report. He also reported that the **information -gathering** stage of an IRS project to streamline corporate filing requirements is almost complete. The task force is currently studying what statistical data are needed from the corporate **tax** return by the Treasury's Office of **Tax** Analysis and the Joint Committee on Taxation. The next step in the process will be to determine what initiatives can be implemented for the 1997 filing season. The IRS is also considering how taxpayers can **file** Forms 1120 **electronically**, he concluded.

B. "Super-CEP" Cases. Mr. Wilson noted that the IRS is reviewing the audits of the 31 largest companies. The agreement rates from...

17/3,K/8

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00568525

\*\* FULL-TEXT AVAILABLE IN FORMATS 7 AND 9 \*\*

**IRS seeks out computer access**

Kafka, Gerald; Gander, Fred

International Tax Review v7 n3 PP: 27-30 Mar 1996

ISSN: 0958-7594 JRNL CODE: ITR

WORD COUNT: 3513 LINE COUNT: 319

Accounting and Tax Database\_1971-1999/Aug W5

ABSTRACT: Increased use of **computers** in the **preparation** of **tax** returns has resulted in an aggressive demand for access to electronic data by the IRS. The basic tools in the IRS available to the IRS to **gather** **information** on the international front are discussed. Sections 6038A and 6038C require certain foreign-owned corporations, and foreign corporations engaged in US business to maintain and furnish to the IRS records needed to determine the correct US **tax** liability, and to act as an agent to receive any IRS summonses for books and records of certain related foreign parties. Section 982 provides the...

... taxpayer produces documentation showing that it had reasonably applied an accepted transfer pricing methodology. Other issues discussed include:  
1. IRS access to computerized records, 2. **information -gathering** techniques, 3. training and assistance requirements, and 4. general

defenses.

17/3,K/9

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00499076

\*\* FULL-TEXT AVAILABLE IN FORMATS 7 AND 9 \*\*

**Tune up for tax season**

Anonymous

Accounting Technology 1995 Accountant's Buyer's Guide PP: 81-92 1995  
ISSN: 0883-1866 JRNL CODE: CIA  
WORD COUNT: 3084 LINE COUNT: 280

Accounting and Tax Database 1971-1999/Aug W5

**ABSTRACT:** In-house **tax** preparation consists of 2 separate, but closely tied, systems. The manual system includes all noncomputerized procedures, such as setting up appointments and **gathering** client **information**. The computerized system includes the actual generation of signature-ready forms and **electronic filing**. Both systems should be examined well in advance of the **tax** season. The first area to examine is the **data collection** process and the method of tracking the status of every client return. **Tax** return tracking can be computerized by using a spreadsheet or other software packages specifically designed for that purpose. Billing is an important part of any **tax preparation** system and should be **computerized** if possible. Users should be sure to inventory **tax** forms, supplies and general resources. The software vendor should be contacted early to determine if any software or procedure changes or enhancements are in the works for the upcoming **tax** season.

...TEXT: information, organizing the information for entry into the computer, approving the draft and finished returns within the firm and with the client, and returning the **completed return** to the client.

The **computerized** system includes the actual generation of signature-ready forms and **electronic filing** when applicable. Other functions that may be either manual, computerized, or a combination of the two include generation of pro forma organizers or client interview forms to be used in the **data collection** process, scheduling staff or return preparation and review, tracking the status of a client's return, **tax** planning and consulting, and billing and collecting for the work performed.

If either or both of these systems is not functioning efficiently, the overall effectiveness...

17/3,K/10

DIALOG(R)File 485:Accounting and Tax Database  
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00482962

\*\* FULL-TEXT AVAILABLE IN FORMATS 7 AND 9 \*\*

**Office technology**

Barth, Claire

Management Accounting v76 n3 PP: 72-73 Sep 1994  
ISSN: 0025-1690 JRNL CODE: NAA  
WORD COUNT: 1129 LINE COUNT: 103

Accounting and Tax Database 1971-1999/Aug W5

...TEXT: formulas, formatting, and data from all releases of Lotus 1-2-3, Microsoft Excel, and Quattro Pro. Popular uses include business applications in accounting and **tax** planning, job estimating, financial modelling, engineering analysis, **electronic** forms, budgeting, price lists, employee **reports**, **data collection**, and other uses. Tools to create Windows applications include the project manager, 3-D graphical spreadsheet editor, prebuilt routines, debugger, tool bar and dialog box...

17/3,K/11

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00478885

\*\* FULL-TEXT AVAILABLE IN FORMATS 7 AND 9 \*\*

**Turn your employees into computer specialists**

Tyler, John A  
Accounting Today v8 n15 PP: 24-25 Aug 22, 1994  
ISSN: 1044-5714 JRNL CODE: ACOY  
WORD COUNT: 876 LINE COUNT: 80

Accounting and Tax Database 1971-1999/Aug W5

...TEXT: There are no outside specialists to do computer work for our professionals. No data input paraprofessionals. No typing pool.

Thus, all of our accounting and tax professionals are computer specialists, including partners. Using computers, our regular professional staff is responsible for our work product from beginning to end. This includes data gathering, auditing procedures, tax preparation, and other professional work. The finished product delivered to clients, be it a financial statement, a tax return, a consultant's report, an electronic template, or some other special presentation, has been prepared using a computer.

How did our computer skills happen? We engineered ourselves to make computer skills a firm priority with every employee, professional or clerical.

In 1982, we...

17/3,K/12

DIALOG(R)File 485:Accounting and Tax Database  
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00466918

\*\* FULL-TEXT AVAILABLE IN FORMATS 7 AND 9 \*\*

**Progress in programs: The annual software review**

Anonymous  
Trusts & Estates v133 n6 PP: 10-48+ Jun 1994  
ISSN: 0041-3682 JRNL CODE: TRE  
WORD COUNT: 12785 LINE COUNT: 1,162

Accounting and Tax Database 1971-1999/Aug W5

...TEXT: 426-6656 or Fax (410) 263-3250.

PV sells valuation reports for more than 3,800 partnerships, suitable for use for 706 reporting and other tax purposes. Clients may make special order reports for any partnership not included among the 3,800. PV gathers the data necessary to prepare a report and the client is spared this tedious task. Reports are delivered on paper, by fax or electronically.

PV offers full and summary reports. Full reports costing \$700 are 100-page documents used when the report is likely to be scrutinized and its assumptions challenged. Summary reports condense full...

17/3,K/13

DIALOG(R)File 485:Accounting and Tax Database  
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00386780

**Using Turbotax to automate Form 1040 tax preparation**

Gellis, Harold C  
Taxation for Accountants v50 n1 PP: 56-59 Jan 1993  
ISSN: 0040-0165 JRNL CODE: TFA

Accounting and Tax Database 1971-1999/Aug W5

ABSTRACT: Chipsoft's 1992 TurboTax ProSeries/1040 is a PC-based Form 1040 tax preparation software package designed to automate the preparation of individual income tax returns. The package also allows tax return data to be used for tax planning. Ancillary modules provide practice administration functions, laser printing support, a client organizer, electronic filing, and networking capabilities. The ProSeries handles all phases of the tax compliance cycle, including: 1. gathering and entering tax data, 2. calculating the tax liability, 3. reviewing and diagnosing the return, and 4. printing and filing the return. The software guides the user through each step of the tax preparation process using logical next step messages that are displayed in a window on the computer screen. Extensive online help screens explain different program features, operating procedures, form information, and data entry fields. Chipsoft's 1992 TurboTax ProSeries/1040 is a comprehensive, powerful tax preparation system that can accommodate the needs of both the sole tax practitioner as well as the mid-sized tax practice.

17/3,K/14

DIALOG(R)File 485:Accounting and Tax Database  
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00339995

\*\* FULL-TEXT AVAILABLE IN FORMATS 7 AND 9 \*\*

**When Do You Hire a High-Powered Tax Preparer?**

Klein, Robert J.  
Financial Services Week v5 n6 PP: 22 Dec 23, 1991  
ISSN: 0895-8440 JRNL CODE: AFSW  
WORD COUNT: 750 LINE COUNT: 68

Accounting and Tax Database 1971-1999/Aug W5

...TEXT: relevant tax information, take advantage of all legitimate deductions and exemptions and turn out a return that will sail through the IRS without offending its computers .

Bad Omens

To evaluate tax preparers , ask what kinds of clients they handle. Are they people like your clients? Does one person in the firm prepare a given return from start...

17/3,K/15

DIALOG(R)File 485:Accounting and Tax Database  
(c) 1999 Bell & Howell. All rts. reserv.

00335426

**Fine-Tune Your In-House Tax Prep Practice**  
Herter, Gerald  
Computers in Accounting v7 n9 PP: 20-27 Nov 1991  
ISSN: 0883-1866 JRNL CODE: CIA

Accounting and Tax Database 1971-1999/Aug W5

ABSTRACT: By analyzing their tax practice before tax season, accountants will achieve better productivity and higher profits. In-house tax preparation consists of the manual system, which includes all noncomputerized procedures, and the computerized system, which includes the actual generation of signature-ready forms and electronic filing when applicable. If these systems do not function efficiently, the overall effectiveness and productivity of the firm will be negatively impacted. Examining both systems in a step-by-step process allows their effectiveness to be judged and uncovers areas that may need work. The first area to examine is the data collection process. Return status must then be considered. A firm's billing system should be reviewed as well. Another

important step is to contact software vendors...

17/3,K/16

DIALOG(R)File 485:Accounting and Tax Database  
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00315786

\*\* FULL-TEXT AVAILABLE IN FORMATS 7 AND 9 \*\*

**Small and Medium-Size Firms Cope with Continuing Professional Education**

Craig, James L., Jr.

CPA Journal v61 n5 PP: 26-37 May 1991

ISSN: 0732-8435 JRNL CODE: CPA

WORD COUNT: 4745 LINE COUNT: 431

Accounting and Tax Database 1971-1999/Aug W5

...TEXT: I keep a log book for each CPA, with a folder where I accumulate the various support documentation of the courses taken.

Gerald: On the **electronic spreadsheet file** I mentioned earlier, **information** is **compiled** by state and provides for overlap as a result of the different compliance periods in each state. One state requires specific identification of the subject matter of the courses, i.e., audit and **tax**. Of course, then there are the AICPA requirements to contend with and a third reporting period. I share Michael's concern about the multiplicity of...

17/3,K/17

DIALOG(R)File 485:Accounting and Tax Database  
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00305826

\*\* FULL-TEXT AVAILABLE IN FORMATS 7 AND 9 \*\*

**Largest Area Certified Public Accounting Firms: Ranked by Number of Local Professional Staff**

Ramsey, Paula

Houston Business Journal v20 n36s1 PP: 18 Jan 28, 1991

JRNL CODE: HBJ

WORD COUNT: 4393 LINE COUNT: 399

Accounting and Tax Database 1971-1999/Aug W5

...TEXT: Chicago'NO. OF OFFICES' LOCAL:

2' NATIONAL:

87'MANAGING PARTNER(S): H. Devon Graham Jr., Randell

C.' Thomas'SAMPLE OF SPECIALTIES: audit a  
nd business advisory, **tax**' consulting, corpo  
rate specialty' services, systems integration  
and' management, information technology'

File 256:SoftBase:Reviews,Companies&Prods. 85-1999/Aug

(c)1999 Info.Sources Inc

File 278:Microcomputer Software Guide 1999/Aug

(c) 1999 Reed Elsevier Inc.

Set	Items	Description
S1	2056	TAX OR TAXES OR INLAND()REVENUE
S2	37534	PREPAR? OR REPORT? OR FILE? ? OR FILING OR (FILL???)IN OR COMPLET?) (3N)(FORM? ? OR RETURN? ? OR DOCUMENT?)
S3	4101	S2(5N)(ELECTRONIC? OR AUTOMATE? OR AUTOMATION OR COMPUTER? OR DIGITAL? OR VIRTUAL OR INTERNET OR ONLINE OR ON()LINE)
S4	11465	COLLECT? OR GATHER? OR COMPIL? OR ASSEMB?
S5	49664	INFORMATION OR DATA OR (BANK? ? OR BROKERAGE? OR INTEREST - OR FINANCIAL OR MORTGAGE OR PAYROLL OR EMPLOYER) (3N)STATEMENT?
S6	258	(MULTIPLE OR MANY OR DIVERSE OR PLURAL? OR MUTUAL()FUND? OR INVESTMENT?) (5N)STATEMENT? OR (W2 OR W()2 OR 1099 OR 1098)
S7	6	CHARIT?(5N)(CONTRIBUTION? OR RECEIPT? OR DONATION?)
S8	583	EFT OR EFTS OR ELECTRONIC?(1N)FUNDS (1N)TRANSFER? OR (ELEC- TRONIC OR E OR DIGITAL OR VIRTUAL) ()(CASH OR WALLET OR PURSE - OR MONEY ) OR ECASH OR EMONEY OR EPAYMENT?
S9	690	(PAY? OR REFUND?) (15N)(ELECTRONIC? OR ONLINE OR ON()LINE OR INTERNET)
S10	49784	S5 OR S6 OR S7
S11	1028	S8 OR S9
S12	0	S1(S)S3(S)S4(5N)S10(S)S11
S13	1	S1(S)S2(S)S4(5N)S10(S)S11
S14	29	S1(S)S4(5N)S10
S15	28	S14 NOT S13

13/7/1 (Item 1 from file: 256)  
DIALOG(R)File 256:SoftBase Reviews,Companies&Prods.  
(c)1999 Info.Sources Inc. All rts. reserv.

01264636 DOCUMENT TYPE: Product

PRODUCT NAME: Comprehensive Integrated Payroll System (CHIPS) (264636)

Donald R Frey & Co Inc (082490)  
40 N Grand Ave #303  
Fort Thomas, KY 41075 United States  
TELEPHONE: (606) 441-6566

RECORD TYPE: Directory

CONTACT: Sales Department

The Comprehensive Integrated Payroll System (CHIPS) is an online, real-time interactive system that is menu-driven and does not require programming knowledge to operate. It is designed to meet the special reporting requirements of local governments, non-profit agencies and school administrations. The system is designed to reduce clerical and administrative costs while giving users control over employee compensation and reporting. The payroll system is fully integrated with Frey & Company's fund accounting system. The primary function of the system is to maintain data of an employee in order to produce the necessary reports to calculate payroll and maintain accurate employee information. Deductions can be made either before or after tax calculations. Additional earnings can be taxable or non-taxable. The system permits the user to modify FICA, local, state and federal tax rates as the need arises. The operator can merely call up the deductions/earning code or tax code/table change function and revise the rates. The software can be used to produce registers and to edit lists of transactions (manual and automatic) before and after calculations, to print payroll checks and to distribute payroll amounts to the General Ledger. Users can also print a worksheet to aid in the gathering and entering of payroll data for manual entry.

REVISION DATE: 960712

15/3,K/1 (Item 1 from file: 256)  
DIALOG(R)File 256:SoftBase:Reviews,Companies&Prods.  
(c)1999 Info.Sources Inc. All rts. reserv.

01609609 DOCUMENT TYPE: Product

**PRODUCT NAME: FASTrack for Windows (609609)**

Best Software Inc (483095)  
11413 Isaac Newton Sq  
Reston, VA 22190 United States  
TELEPHONE: (703) 709-5200

RECORD TYPE: Directory

CONTACT: Sales Department

REVISION DATE: 000000

...be conducted at multiple sites, and to reconcile data at a central location. If a remote site is not accessible over a LAN, FASTrack can collect data at the site and reconcile it at a central location. The Intermec Janus 2010/2020 guide provides exact instructions on how to track assets at...

...by allowing the organization to accurately account for such assets as PCs, printers, and other hardware, and to avoid overpaying insurance premiums, mis-reporting property taxes, or missing valuable depreciation deductions. Best! provides many value-added services and support with its optional Support Plus program, which allows members to receive system enhancements and tax updates, toll-free technical support, online technical resources, and more. Physically hard to reach assets and assets exposed to harsh weather conditions can be respectively...

...connect the reader to a PC whenever beginning an inventory. Many PCMCIA cards, battery chargers, carrying cases, holsters, and other options are available to make data collection as easy as possible.

15/3,K/2 (Item 2 from file: 256)  
DIALOG(R)File 256:SoftBase:Reviews,Companies&Prods.  
(c)1999 Info.Sources Inc. All rts. reserv.

01607215 DOCUMENT TYPE: Product

**PRODUCT NAME: Coindata & Stampdata (607215)**

Dynacomp Inc (095443)  
4560 E Lake Rd  
Lavonia, NY 14487 United States  
TELEPHONE: (716) 346-9788

RECORD TYPE: Directory

CONTACT: Sales Department

REVISION DATE: 961023

Coindata & Stampdata are high-speed compiled BASIC (source included) programs which use random-access files to compactly store and quickly retrieve stamp and coin collection information. Both programs are easy to use, self-prompts and well error-trapped. With these programs the user may record the various characteristics which describe their collections, search for coins and stamps having particular characteristics, compute totals (e.g., for tax purposes), and print in several formats. Up to 300 coin records can be cataloged on a single-sided disk (800 on a double-sided diskette...).

...a selected listing; (2) print a range of listings; (3) print a catalog

investment status including results of trading. The financial results are summed for **tax** purposes; regular or capital gains incom~~e~~ and include estimated market value; and (4) search/print entries according to a particular characteristic.

✓ 15/3,K/3 (Item 3 from file: 256)  
DIALOG(R)File 256:SoftBase:Reviews,Companies&Prods.  
(c)1999 Info.Sources Inc. All rts. reserv.

01566268 DOCUMENT TYPE: Product

PRODUCT NAME: CA-Infopoint Combined Interest Reporting (566268)

Computer Associates International Inc (081957)  
1 Computer Associates Plaza  
Islandia, NY 11749 United States  
TELEPHONE: (516) 342-5224

RECORD TYPE: Directory

CONTACT: Sales Department

REVISION DATE: 960223

CA-Infopoint Combined Interest Reporting allows users to consolidate customer and account information in compliance with IRS regulations for the annual reporting of interest, withholding **tax** and other reportable income. Account **information** is **collected** from all deposit accounts including time investments, all loan accounts, retirement plans and items redeemed over-the-counter such as bonds, coupons and other negotiable... statements; (2) 1098 mortgage interest; (3) 1099-INT interest income; (4) 1099-OID original issue discount; (5) 1099-R retirement plan distribution; (6) W-9 **tax** identification number certification; (7) IRS tapes; (8) reporting; (9) B notice processing; (10) due diligence processing; (11) 1099-A acquisition of abandonment of secured property...

15/3,K/4 (Item 4 from file: 256)  
DIALOG(R)File 256:SoftBase:Reviews,Companies&Prods.  
(c)1999 Info.Sources Inc. All rts. reserv.

01005202 DOCUMENT TYPE: Product

PRODUCT NAME: RealWorld Payroll 7 (005202)

RealWorld Corp (107000)  
670 Commercial St PO Box 9516  
Manchester, NH 03108-9516 United States  
TELEPHONE: (603) 641-0200

RECORD TYPE: Directory

CONTACT: Sales Department

REVISION DATE: 961121

RealWorld Payrol 7 helps users maintain employee payroll information, handle voluntary deductions, calculate **taxes** and print payroll checks. With payroll being one of the major expenses of business, the package allows users to eliminate tedious manual payroll calculations and save time **gathering** and preparing quarterly **tax** **information**, W-2 and 1099 forms. They can also save money on continuous payments to a service bureau for these functions.

15/3,K/5 (Item 5 from file: 256)  
DIALOG(R)File 256:SoftBase:Reviews,Companies&Prods.

(c)1999 Info.Sources Inc. All rts. reserv.

00115571 DOCUMENT TYPE: Review

PRODUCT NAMES: QuickBooks Pro (585904); Timeslips (406497)

TITLE: Time Is on Your Side: Software that can help beat the clock

AUTHOR: Patz, Joel T.

SOURCE: Small Business Computing & Communic, v4 n4 p44(2) Apr 1999

HOMEPAGE: <http://www.smalloffice.com>

RECORD TYPE: Review

REVIEW TYPE: Product Analysis

GRADE: Product Analysis, No Rating

REVISION DATE: 990530

...only some of their features. Some comprehensive products can convert data to invoices, manage payments, and monitor accounts receivable. One company uses QuickBooks Pro to collect weekly data and bill based on percentages, while data can also flow to invoices of payroll with a click of a button. Another user reports time tracking...

...records time and expenses, bills, and processes accounts receivable. Invoicing and reporting allow generation of clear account statements, work-in-progress accounts, and year-end tax summaries.

15/3,K/6 (Item 6 from file: 256)

DIALOG(R) File 256:SoftBase:Reviews,Companies&Prods.

(c)1999 Info.Sources Inc. All rts. reserv.

00115561 DOCUMENT TYPE: Review

PRODUCT NAMES: TurboTax (410853); MacInTax (270342)

TITLE: Tax Software from Intuit

AUTHOR: Pack, Thomas

SOURCE: Link-Up, v16 n2 p30(1) Mar/Apr 1999

ISSN: 0734-988X

HOMEPAGE: <http://www.infotoday.com>

RECORD TYPE: Review

REVIEW TYPE: Review

GRADE: A

REVISION DATE: 990530

Intuit's TurboTax and MacInTax are reviewed tax preparation programs that help users prepare their own tax returns. Both are available in basic and deluxe editions, federal and state versions, personal and business editions, and a new Home & Business edition. An online version called Web TurboTax also allows users to prepare a return via a World Wide Web browser. For the 1998 tax year, Intuit has improved the basic TurboTax and MacInTax programs by making the interview process faster in its ability to gather information for the return and by making data navigation easier. More relevant questions are asked on fewer screens, and the products are programmed to skip questions...

...review, the user can choose it from an outline of the return. Deluxe editions have all the basic editions' features, with an added On-screen Tax Library that holds electronic versions of IRS publications and Money Magazine's Income Tax Handbook. The Business versions are set up for corporations, s-corporations, and partnerships, while TurboTax Home & Business and MacInTax Home & Business are for sole proprietors.

15/3,K/7 (Item 7 from file: 256)

DIALOG(R) File 256:SoftBase:Reviews,Companies&Prods.

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00111292 DOCUMENT TYPE: Review

PRODUCT NAMES: Internet (833029); Accountants (830380)

TITLE: A Network for the World

AUTHOR: Koreto, Richard J.

SOURCE: Journal of Accountancy, v186 n2 p33(3) Aug 1998

ISSN: 0021-8448

HOMEPAGE: <http://www.aicpa.org>

RECORD TYPE: Review

REVIEW TYPE: Product Analysis

GRADE: Product Analysis, No Rating

REVISION DATE: 990130

...newsgroups may differ: some invite debate, while others may be more genteel. Each has its own personality. Accountants have plenty of resources, and the misc.**taxes** .moderated newsgroup is the most popular for accountants. It is mostly **tax** -oriented, but does include postings on broader issues. As a moderated newsgroup, a question is more controlled than the usually anarchistic Usenet. Readers still post...

...newsgroup, it is first routed to a moderator, who decides whether it is appropriate. Some accountants find this newsgroup a good place to network and **gather information** from experts in various fields.

15/3,K/8 (Item 8 from file: 256)

DIALOG(R)File 256:SoftBase:Reviews,Companies&Prods.

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00110222 DOCUMENT TYPE: Review

PRODUCT NAMES: Company - Great Plains (854905); Company - Sage State of the Art Inc (855391); Company - Macola Inc (857238)

TITLE: The Vendor's New Role

AUTHOR: Scott, Robert W.

SOURCE: Accounting Technology, v14 n5 p16(4) Jun 1998

ISSN: 0883-1866

HOMEPAGE: <http://www.electronicaccountant.com>

RECORD TYPE: Review

REVIEW TYPE: Company

REVISION DATE: 990823

...vendors highlighted in a discussion of an emerging new role for accounting product vendors that allows them to take part in the daily routines of **tax** and accounting professionals. This new level of support is made possible by the Web, promoted by the expansion of nonconventional services, and needed by accounting...

...primarily focused on sales and marketing, partner operations, and communications. Macola Software's Infosource provides business advice to resellers and is developing benchmarking abilities by **collecting data** from resellers.

15/3,K/9 (Item 9 from file: 256)

DIALOG(R)File 256:SoftBase:Reviews,Companies&Prods.

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00105936 DOCUMENT TYPE: Review

PRODUCT NAMES: Company - Reed Elsevier plc (US) (865516); Company - CCH

Inc. (862061)

TITLE: Legal and tax sources create powerful new combination  
AUTHOR: Owen, Tim  
SOURCE: Information World Review, v131 p9(1) Dec 1997  
ISSN: 0950-9879  
HOMEPAGE: <http://www.iwr.co.uk>

RECORD TYPE: Review  
REVIEW TYPE: Company

REVISION DATE: 990530

Reed Elsevier (RE) currently owns the LEXIS-NEXIS collection of online legal information, and Wolters Kluwer, with which Elsevier intends to merge, owns the 700 print and CD-ROM tax titles from CCH. RE is also buying BioMedNet and ChemWeb from Current Science Group. When RE finishes its stock swap deal early in 1998, a...

15/3,K/10 (Item 10 from file: 256)  
DIALOG(R)File 256:SoftBase:Reviews,Companies&Prods.  
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00105759 DOCUMENT TYPE: Review

PRODUCT NAMES: Microsoft Site Server 3.0 Commerce Edition Beta (658057)

TITLE: Microsoft takes stab at E-commerce  
AUTHOR: Apicella, Mario  
SOURCE: LAN Times, v15 n4 p19(1) Feb 16, 1998  
ISSN: 1040-5917  
HOMEPAGE: <http://www.lantimes.com>

RECORD TYPE: Review  
REVIEW TYPE: Review  
GRADE: C

REVISION DATE: 990530

...the basic version upon which the Commerce Edition is built, is a more limited but better product overall. Site Server provides tools for managing content, collecting information, and analyzing the structure of a Web site. The Commerce Edition of SS promises to deliver a structure for businesses to use to make the...

...operators get authority only over specific sites. While the Site Server is good, business features are lacking and have to be supplemented by other products. Tax information, for example, is available for only six states, and credit card authorization is not provided. Those who need software to build a ready-to...

15/3,K/11 (Item 11 from file: 256)  
DIALOG(R)File 256:SoftBase:Reviews,Companies&Prods.  
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00103818 DOCUMENT TYPE: Review

PRODUCT NAMES: Trustwise 2.0 Windows & Windows NT (674303)

TITLE: Helping Your Clients Understand Trust Planning  
AUTHOR: Ward, Denise  
SOURCE: Law Office Computing, v7 n4 p41(1) Aug/Sep 1997  
ISSN: 1055-128X

RECORD TYPE: Review  
REVIEW TYPE: Review  
GRADE: A

REVISION DATE: 980228

...s Trustwise 2.0 helps lawyers make estate planning explanations as understandable as possible for clients. The user can print a three-page Client Estate Information worksheet. Collecting information for the client and entering it into the program is streamlined and easy; users can concentrate on the plan and provide the direction needed by...  
...the estate with and without a plan, an asset allocation graph, Bypass and QTIP diagrams, a probate diagram, an Estate Plan Summary, and an Estate Tax Projection. The estate planning packet provided is easily read and used by the client, and frees up the attorney to provide advice, counsel, and document...

15/3,K/12 (Item 12 from file: 256)  
DIALOG(R)File 256:SoftBase:Reviews,Companies&Prods.  
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00103771 DOCUMENT TYPE: Review

PRODUCT NAMES: ReloSmart 97 Windows (641308)

TITLE: ReloSmart Helps You Relocate Intelligently  
AUTHOR: Haskin, David  
SOURCE: Computer Shopper, v17 n9 p536(1) Sep 1997  
ISSN: 0886-0556  
HOMEPAGE: <http://www.cshopper.com>

RECORD TYPE: Review

REVIEW TYPE: Review

GRADE: A

REVISION DATE: 980530

ReloSmart 97 from Right Choice is a good choice for Windows 3.x users considering relocating to a new neighborhood. The program begins by collecting information on the user's present home and work situation through use of a series of dialog boxes. Parameters such as quality-of-life, commuting distance, climate, and crime rates are utilized, as well answers to financial questions about salary, insurance rates, and housing costs. ReloSmart uses a database containing tax rates, real-estate information, and crime statistics for 300 United States cities, and projects the results onto a series of screens comparing the user's...

15/3,K/13 (Item 13 from file: 256)  
DIALOG(R)File 256:SoftBase:Reviews,Companies&Prods.  
(c)1999 Info.Sources Inc. All rts. reserv.

00098660 DOCUMENT TYPE: Review

PRODUCT NAMES: TurboTax (410853); MacInTax (270342); Personal Tax Edge (350168); Kiplinger TaxCut (600156)

TITLE: Attack Your Taxes  
AUTHOR: Keizer, Gregg  
SOURCE: FamilyPC, v4 n3 p62(3) Mar 1997  
ISSN: 1076-7754  
HOMEPAGE: <http://www.family.com>

RECORD TYPE: Review

REVIEW TYPE: Product Comparison

GRADE: Product Comparison, No Rating

REVISION DATE: 990430

Intuit's TurboTax, MacInTax, and Personal Tax Edge, and Block Financial's

Kiplinger TaxCut are PC-based **tax** preparation packages reviewed and compared. The low-cost programs know what questions to ask, rarely make mistakes, and deliver many IRS forms to the home. Users can use **tax** software to **gather information** from personal finance software or paper forms, and bring the information to a professional **tax** preparer. Users can also prepare and file their **taxes** themselves using the program. About 90 percent of TurboTax users, says Intuit, are confident enough to calculate their own **taxes**, and the other 10 percent use them to coordinate finances to save time as filing time approaches. All three products use clear questions and offer lots of advice. They ask questions that have to be answered to fill out **tax** forms and to choose the forms needed. Personal **Tax** Edge is priced at half the cost of the competition, but it provides less **tax** advice and has kludgy, crowded screens. TurboTax and MacInTax are rated highest, especially for their excellent Q&A interviews. TurboTax is enhanced to make it...

15/3,K/14 (Item 14 from file: 256)  
DIALOG(R)File 256:SoftBase:Reviews,Companies&Prods.  
(c)1999 Info.Sources Inc. All rts. reserv.

00088630 DOCUMENT TYPE: Review

PRODUCT NAMES: Netscape Navigator (530883)

TITLE: Net development: Fork in the road  
AUTHOR: Moeller, Michael  
SOURCE: PC Week, v13 n5 p51(2) Feb 5, 1996  
ISSN: 0740-1604  
HOMEPAGE: <http://www.pcweek.com>

RECORD TYPE: Review  
REVIEW TYPE: Product Analysis  
GRADE: Product Analysis, No Rating

REVISION DATE: 990530

Microsoft and Netscape Communications take distinctly different paths to World Wide Web browser development. Netscape's Inline Plug-In to the Netscape Navigator browser **collects data** from an Internet-connected server; its application programming interface (API) allows applications to run inside Navigator. Microsoft users will browse the Web from the desktop

...  
...the supporting Sweeper SDK, which makes products Internet-ready. A Microsoft user and insurance broker says he likes Microsoft's plan, while a financial and **tax** consultant and Netscape user says the plug-in method gives him useful, advanced tools for working directly on the Internet. About 15 software vendors offer...

15/3,K/15 (Item 15 from file: 256)  
DIALOG(R)File 256:SoftBase:Reviews,Companies&Prods.  
(c)1999 Info.Sources Inc. All rts. reserv.

00078879 DOCUMENT TYPE: Review

PRODUCT NAMES: LANAlert (308447); LANAuditor 3.0 (318671); Norton Administrator for Networks 1.5 (472191)

TITLE: Managing System Assets  
AUTHOR: Huber, Richard F.  
SOURCE: PC Today, v9 n6 p43(3) Jun 1995  
ISSN: 1040-6484  
HOMEPAGE: <http://www.pctoday.com>

RECORD TYPE: Review  
REVIEW TYPE: Product Analysis

GRADE: Product Analysis, No Rating

REVISION DATE: 990530

...show that U.S. companies lose up to \$20 billion a year by failing to correctly track hardware, incomplete or incorrect software licenses, and property **taxes**. Asset management issues discussed here include software metering and control, use of suites, and leased equipment. Buyers of inventory software are advised to avoid packages that don't include hardware inventory, fast **data collection**, scheduling flexibility, multiplatform and multiple network operating systems, report writing, and user-definable parameters. Horizon's LANauditor 3.0, Symantec's Norton Administrator for Networks...

15/3,K/16 (Item 16 from file: 256)

DIALOG(R)File 256:SoftBase:Reviews,Companies&Prods.

(c)1999 Info.Sources Inc. All rts. reserv.

00075501 DOCUMENT TYPE: Review

PRODUCT NAMES: TurboTax (410853)

TITLE: Make April 15 Less Taxing

AUTHOR: Middleton, Timothy

SOURCE: ComputerLife, v2 n3 p159(3) Mar 1995

ISSN: 1076-9862

Homepage: <http://www.zdnet.com/complife>

RECORD TYPE: Review

REVIEW TYPE: Product Analysis

GRADE: Product Analysis, No Rating

REVISION DATE: 980530

**Tax** preparation software can keep the complex rules of taxation straight for the taxpaying user. Intuit's TurboTax walks the user through a six-step process...

...and flags anything that may trigger an audit. It will prepare the state return, file returns electronically, or print them on paper. TurboTax has two **information gathering** modes. The EasyStep method takes users through every step of the process. The Forms method is faster, and useful for those who may be preparing...

15/3,K/17 (Item 17 from file: 256)

DIALOG(R)File 256:SoftBase:Reviews,Companies&Prods.

(c)1999 Info.Sources Inc. All rts. reserv.

00062607 DOCUMENT TYPE: Review

PRODUCT NAMES: MacInTax Tax Planner (499871)

TITLE: Tax Planning

AUTHOR: Schorr, Joseph

SOURCE: Macworld, v11 n4 p63(1) Apr 1994

ISSN: 0741-8647

Homepage: <http://www.macworld.com>

RECORD TYPE: Review

REVIEW TYPE: Product Analysis

GRADE: Product Analysis, No Rating

REVISION DATE: 990630

...completed return, provides a five-year forecast of tax liability, projecting figures through 1997 in a concise summary. Tax Planner uses an

interview format for collecting tax data . After entering the data , users can build up to five different tax scenarios. This can be useful for estimating the impact of different actions. MacInTax Tax Savings Guide is another simple to use product. It is a collection of fully indexed tax tips and suggestions, which help a user better understand the tax return, and reduce tax liability. The program does not do any forms preparation, but just gives professional advice. Unfortunately, despite the good advice and content, it is impossible to cut and paste into another program, or even print the tax tips.

15/3,K/18 (Item 18 from file: 256)  
DIALOG(R)File 256:SoftBase:Reviews,Companies&Prods.  
(c)1999 Info.Sources Inc. All rts. reserv.

00047335 DOCUMENT TYPE: Review

PRODUCT NAMES: AM-Tax (211451); Andrew Tobias' TaxCut (211508); EasyTax (449997); Personal Tax Edge (350168); Tax Solver (403466); TurboTax (410853)

TITLE: Deep in the Art of Taxes

AUTHOR: Wise, Naomi Melville, Richard

SOURCE: PC World/Lotus Edition, v11 n3 p163(7) Mar 1993

ISSN: 0737-8939

RECORD TYPE: Review

REVIEW TYPE: Product Analysis

GRADE: Product Analysis, No Rating

REVISION DATE: 990720

You can save the cost of a tax preparer and learn a few tax tips with tax preparation interactive programs like AM-Tax , Andrew Tobias' TaxCut, Easy Tax , Personal Tax Edge, Tax Solver, and TurboTax. These products use an interview process to gather information that helps give you the best tax advantage. The functions handled by these programs can include taxation for wages, unearned income, child care deductions, charitable contributions, standard mileage, state and local income and property taxes , and home mortgage interest calculation. The programs perform most arithmetic, link related forms, transfer numerical totals from worksheets to schedules for entry to the 1040...

...an online audit function shows you any inconsistent or omitted data. TurboTax is a slick program for the experienced user, while TaxCut is ideal for tax preparation novices.

15/3,K/19 (Item 19 from file: 256)  
DIALOG(R)File 256:SoftBase:Reviews,Companies&Prods.  
(c)1999 Info.Sources Inc. All rts. reserv.

00047238 DOCUMENT TYPE: Review

PRODUCT NAMES: Andrew Tobias' TaxCut DOS (211508); Andrew Tobias' TaxCut Windows (211508); Personal Tax Edge DOS (350168); Personal Tax Edge Windows (350168); TurboTax DOS (410853); TurboTax Windows (410853); AM-Tax (211451)

TITLE: Zoom In On Trouble-Free Tax Programs

AUTHOR: Gilliland, Steve

SOURCE: Computer Shopper, v13 n3 p550(6) Mar 1993

ISSN: 0886-0556

Homepage: <http://www.cshopper.com>

RECORD TYPE: Review

REVIEW TYPE: Review

GRADE: A

REVISION DATE: 990720

PC-based **tax** programs for personal returns are improving and often easier to use. Four are reviewed in detail. All run under DOS or Windows. Andrew Tobias' TaxCut 1040 continues its tradition of excellence and slightly outshines the others in ease of use and number of forms. Personal **Tax** Edge has new features, including a **Tax** Organizer for **data collection** and **data** entry. TurboTax offers a comprehensive data entry feature, EasyStep, that makes it arguably the best of the four programs. On the Windows side, TaxCut is the best, but on the DOS side it is a toss-up. AM-**Tax** does not offer many help functions to the user and makes what-if scenarios difficult. Unlike the others, it has no feature warning of a potential audit and also has no Windows version. If you need **tax** assistance, leave it alone.

15/3,K/20 (Item 20 from file: 256)  
DIALOG(R)File 256:SoftBase:Reviews,Companies&Prods.  
(c)1999 Info.Sources Inc. All rts. reserv.

00041673 DOCUMENT TYPE: Review

PRODUCT NAMES: Expert Advisor (362841)

TITLE: Automating a Help Desk: Expert Advisor at Work  
AUTHOR: Kulik, Phillip  
SOURCE: PC AI, v6 n6 p26(2) Nov/Dec 1992  
ISSN: 0894-0711  
HOMEPAGE: <http://www.pcai.com/pcai>

RECORD TYPE: Review  
REVIEW TYPE: Product Analysis  
GRADE: Product Analysis, No Rating

REVISION DATE: 990521

...its help desk operation. Color Tile selected the PC development tool Expert Advisor from Software Artistry because it incorporates multimedia, hypermedia, and contained the necessary **information gathering**, tracking, and reporting functions. The graphic development features in Expert Advisor allowed Color Tile to construct an icon-based user interface to explicitly show the problem areas that a help desk operator has to deal with. It also enables the help desk to meet **tax** authorization requests, produce disbursement requests, and handle cash refunds and accident reports. Future plans call for Color Tile's help desk to provide information in...

15/3,K/21 (Item 21 from file: 256)  
DIALOG(R)File 256:SoftBase:Reviews,Companies&Prods.  
(c)1999 Info.Sources Inc. All rts. reserv.

00026552 DOCUMENT TYPE: Review

PRODUCT NAMES: WillPower 1.0 (324761)

TITLE: WillPower 1.0  
AUTHOR: Holzberg, Carol  
SOURCE: Compute!, v13 n4 p90(1) Apr 1991  
ISSN: 0194-357X

RECORD TYPE: Review  
REVIEW TYPE: Review  
GRADE: A

REVISION DATE: 940330

...and WillWare, can help you put your estate in order while using up less of your attorney's time. The PC program allows you to **compile** background **information**, but does not include **tax** planning information or tell you if all necessary details have been covered. Five data screens are used: General Information, Valuing Your Estate, Leaving Your Property...

**15/3,K/22 (Item 1 from file: 278)**  
DIALOG(R)File 278:Microcomputer Software Guide  
(c) 1999 Reed Elsevier Inc. All rts. reserv.

0027280  
0317699XX STATUS: ACTIVE ENTRY  
**TITLE: Doctor's Legal Aid**  
AUTHOR: Larry Friedman; Steven Friedman  
RELEASE DATE: 07/1989  
PUBLISHER: On the Mark Computer Software Co.; OMCS Co; IBM compatible  
(1-877766)

**15/3,K/23 (Item 2 from file: 278)**  
DIALOG(R)File 278:Microcomputer Software Guide  
(c) 1999 Reed Elsevier Inc. All rts. reserv.

0022542  
311000XXX STATUS: ACTIVE ENTRY  
**TITLE: Andrew Tobias' TaxCut**  
RELEASE DATE: 10/1992  
PUBLISHER: MECA Software, Inc.; MECA (0-925349)

**15/3,K/24 (Item 3 from file: 278)**  
DIALOG(R)File 278:Microcomputer Software Guide  
(c) 1999 Reed Elsevier Inc. All rts. reserv.

0022436  
3114363XX STATUS: ACTIVE ENTRY  
**TITLE: Nolo's Personal Recordkeeper**  
VERSION: 5.0  
AUTHOR: Carol Pladsen; Ralph Warner  
PUBLISHER: Nolo Pr.; Nolo Pr; Macintosh or compatible computer with  
68030 processor or higher; IBM PC or compatible 386 or higher (4Mb) (0-917316; 0-87337)

**15/3,K/25 (Item 4 from file: 278)**  
DIALOG(R)File 278:Microcomputer Software Guide  
(c) 1999 Reed Elsevier Inc. All rts. reserv.

0022123  
3129111XX STATUS: ACTIVE ENTRY  
**TITLE: IMRS Forms**  
PUBLISHER: Hyperion Soft; Hyperion Soft (0-924469)

**15/3,K/26 (Item 5 from file: 278)**  
DIALOG(R)File 278:Microcomputer Software Guide  
(c) 1999 Reed Elsevier Inc. All rts. reserv.

0019892  
3207146XX STATUS: ACTIVE ENTRY  
**TITLE: Accountant's Stock System**  
VERSION: 4.0  
RELEASE DATE: 1994  
PUBLISHER: Omni Software Systems, Inc. (Indiana); Omni Soft IN; IBM PC  
or compatible (256k) (0-925923)

15/3,K/27 (Item 6 from file: 278)  
DIALOG(R)File 278:Microcomputer Software Guide  
(c) 1999 Reed Elsevier Inc. All rts. reserv.

0019763  
3210765XX STATUS: ACTIVE ENTRY

**TITLE: MACRO**

AUTHOR: Ralph F. Lewis; Michael S. Magee  
RELEASE DATE: 1989  
PUBLISHER: Economics Research, Inc.; Econ Res; IBM PC, XT, AT, PS/2 or  
compatible (256k); IBM PC, XT, AT, PS/2 or compatible (256k) (1-879995)

15/3,K/28 (Item 7 from file: 278)  
DIALOG(R)File 278:Microcomputer Software Guide  
(c) 1999 Reed Elsevier Inc. All rts. reserv.

0017716  
3255256XX STATUS: ACTIVE ENTRY

**TITLE: DATA Plus For Windows**

VERSION: 4.0  
RELEASE DATE: 10/1994  
PUBLISHER: ViewPlan, Inc.; ViewPlan; IBM & compatibles (1Mb) (0-943293

)

15/5/22 (Item 1 from file: 278)  
DIALOG(R)File 278:Microcomputer Software Guide  
(c) 1999 Reed Elsevier Inc. All rts. reserv.

0027280  
0317699XX STATUS: ACTIVE ENTRY  
**TITLE: Doctor's Legal Aid**  
AUTHOR: Larry Friedman; Steven Friedman  
RELEASE DATE: 07/1989  
MICROPROCESSOR TYPE: 30 day exchange or refund if package seals unopened  
PRICE INFORMATION:  
114.00, 1-877766-32-1, LEGL-5  
114.00, 1-877766-34-8, LEGL-3  
74.00 manual only, 1-877766-35-6, LEGL-M  
ANNOTATION: EMPLOYEES: Benefits, Associates, Licenses, Tax Info, Progress Reviews, Duties & Jobs, Payroll, Interviewing. PATIENTS & INSURANCE: Financial Responsibility & Recourse, Estimates & Statements, Refunds, Collection, Release & Assignment. MALPRACTICE AIDS: Errors & Omissions, Contractual Obligations, Abandonment, Minors & Age of Consent, Credit & Loans, Literature. LIABILITY: Informed Consent, Charting, Malpractice Prevention, Record Keeping, Property, Torts. Fully Computerized. Not Copy-Protected  
DESCRIPTORS: MEDICAL - OFFICE MANAGEMENT; MEDICAL - INSURANCE CLAIMS AND FORMS; LEGAL - GENERAL  
DESCRIPTOR CODES: 10006783; 10006679; 10005225  
PUBLISHER: On the Mark Computer Software Co.; OMCS Co; IBM compatible (1-877766)

ADDRESS: 1762 Westwood Blvd., No. 460  
Los Angeles, CA 90024-5608

15/5/23 (Item 2 from file: 278)  
DIALOG(R)File 278:Microcomputer Software Guide  
(c) 1999 Reed Elsevier Inc. All rts. reserv.

0022542  
311000XXX STATUS: ACTIVE ENTRY  
**TITLE: Andrew Tobias' TaxCut**  
RELEASE DATE: 10/1992  
COMPATIBLE HARDWARE: IBM PC & compatibles, PS/2  
MEMORY REQUIRED: 640k  
PRICE INFORMATION:  
79.95 3.5" or 5.25" disk  
ANNOTATION: The Program's "Expert System" Allows User to Prepare a Professional Quality Tax Return Without the Help of an Accountant. Automatically Calculates & Prints Form 1040 Tax Returns & Other IRS Approved Forms & Schedules. Also Gathers Information via an Interview Format Conducted in Layman's Terms  
DESCRIPTORS: PERSONAL FINANCE AND BUDGETING - TAX PLANNING AND PREPARATION  
DESCRIPTOR CODES: 80000605  
PUBLISHER: MECA Software, Inc.; MECA (0-925349)

ADDRESS: 115 Corporated Dr.  
Trumbull, CT 06611-1386  
TEL.: 203-256-5000  
SAN: 655-4822

15/5/24 (Item 3 from file: 278)  
DIALOG(R)File 278:Microcomputer Software Guide  
(c) 1999 Reed Elsevier Inc. All rts. reserv.

0022436  
3114363XX STATUS: ACTIVE ENTRY  
**TITLE: Nolo's Personal Recordkeeper**

VERSION: 5.0

AUTHOR: Carol Pladsen; Ralph Warner

MICROPROCESSOR TYPE: See technical support Monday-Friday, 9-5 PST;  
unlimited money back guarantee

PRICE INFORMATION:

3.5" disk 59.95, 0-87337-483-5

3.5" disk 49.95, 0-87337-361-8

ANNOTATION: Organizes personal financial & legal records, keeps track of emergency information, sources of income, real estate, business interests, collectibles, tax records, medical information & more. The ultimate organization solution which allows users to create lists of insured property, compute net worth, consolidate emergency information into one place & export to Quicken home inventory & net worth reports. Personal Recordkeeper makes it easy to save time, cut clutter & get organized

DESCRIPTORS: LEGAL - OFFICE MANAGEMENT; LEGAL - FINANCIAL ANALYSIS;  
PERSONAL RECORDKEEPING - GENERAL

DESCRIPTOR CODES: 10005407; 10005183; 80000666

PUBLISHER: Nolo Pr.; Nolo Pr; Macintosh or compatible computer with  
68030 processor or higher; IBM PC or compatible 386 or higher (4Mb) (0-  
917316; 0-87337)

ADDRESS: 950 Parker St.  
Berkeley, CA 94710  
TEL.: 510-549-1976  
SAN: 206-7935

15/5/25 (Item 4 from file: 278)

DIALOG(R)File 278:Microcomputer Software Guide  
(c) 1999 Reed Elsevier Inc. All rts. reserv.

0022123

3129111XX STATUS: ACTIVE ENTRY

TITLE: IMRS Forms

MICROPROCESSOR TYPE: Installation support; training; telephone support

OPERATING SYSTEM(S) REQUIRED: PC-DOS/MS-DOS 3.0 or higher, MS Windows

MEMORY REQUIRED: 4000k

PRICE INFORMATION:

\$40,000.00 per headquarter site fee

ANNOTATION: PC-Based Collection & Management System That Completely Automates Numeric & Textual Data Collection Requirements Throughout a Corporation. System Is Customizable for Variety of Applications, Including Tax Reporting, Inventory Control, Sales Tracking, & Scheduled Financial Data Collection

DESCRIPTORS: DATABASE MANAGEMENT - DATA COLLECTION

DESCRIPTOR CODES: 10002509

PUBLISHER: Hyperion Soft; Hyperion Soft (0-924469)

ADDRESS: 900 Long Ridge Rd.  
Stamford, CT 06902

TEL.: 203-321-3500

SAN: 655-8291

15/5/26 (Item 5 from file: 278)

DIALOG(R)File 278:Microcomputer Software Guide  
(c) 1999 Reed Elsevier Inc. All rts. reserv.

0019892

3207146XX STATUS: ACTIVE ENTRY

TITLE: Accountant's Stock System

VERSION: 4.0

RELEASE DATE: 1994

MICROPROCESSOR TYPE: Unlimited telephone support

PRICE INFORMATION:

125.00

ANNOTATION: Designed for the professional accountant who does work for various clients who have several stock transactions during the year. The

system collects all of the information that is essential for the accountant to have for year end tax reporting including purchase date, total cost, dividends received, sales etc & gains or losses on each stock. Computation of long term or short term gains or losses is automatic. Attachments for Schedule B & Schedule D, IRS Form 1040 are prepared at year end. Eliminates the need to input repetitive information year after year

DESCRIPTORS: FINANCIAL ANALYSIS - STOCK MARKET; ACCOUNTING - MISCELLANEOUS

DESCRIPTOR CODES: 10003241; 10001153

PUBLISHER: Omni Software Systems, Inc. (Indiana); Omni Soft IN; IBM PC or compatible (256k) (0-925923)

ADDRESS: 3605 45th St.  
Highland, IN 46322-3007

TEL.: 219-924-3522

SAN: 265-7368

15/5/27 (Item 6 from file: 278)

DIALOG(R) File 278:Microcomputer Software Guide

(c) 1999 Reed Elsevier Inc. All rts. reserv.

0019763

3210765XX STATUS: ACTIVE ENTRY

**TITLE: MACRO**

AUTHOR: Ralph F. Lewis; Michael S. Magee

RELEASE DATE: 1989

MICROPROCESSOR TYPE: Warranty 90 days

PRICE INFORMATION:

disk 4.95, 1-879995-14-X

disk 7.95, 1-879995-15-8

disk 99.00, 1-879995-15-8

disk 199.00, 1-879995-16-6

ANNOTATION: A Computerized Simulation of the U. S. Economy. Students Enter Changes They Wish to Make in Government Expenditures, Marginal Tax Rates, & the Money Supply. The Effects of These Changes on the Macroeconomic Aggregates & the Economy are Displayed. Variables Can Be Plotted Against Each Other & Phillips Curves Plotted. Instructor's Version Provides for Utilities & Collection of Student Data for Monitoring Purposes & Reports. Ideal for Extra Credit

DESCRIPTORS: FINANCIAL ANALYSIS - ECONOMIC ANALYSIS

DESCRIPTOR CODES: 10003113

PUBLISHER: Economics Research, Inc.; Econ Res; IBM PC, XT, AT, PS/2 or compatible (256k); IBM PC, XT, AT, PS/2 or compatible (256k) (1-879995)

ADDRESS: 1361 Valencia Ave.

Tustin, CA 92680-6459

TEL.: 714-641-3955

?t s15/5/28

15/5/28 (Item 7 from file: 278)

DIALOG(R) File 278:Microcomputer Software Guide

(c) 1999 Reed Elsevier Inc. All rts. reserv.

0017716

3255256XX STATUS: ACTIVE ENTRY

**TITLE: DATA Plus For Windows**

VERSION: 4.0

RELEASE DATE: 10/1994

MICROPROCESSOR TYPE: Customer Service is provided to all customers free of charge for 30 days after the purchase date. After that time, maintenance may be purchased at \$150 per year

PRICE INFORMATION:

\$119.00 Stand Alone Version, 0-943293-09-X

ANNOTATION: Allows for Detailed Gathering of Asset Information for Use in Estate Tax Planning

DESCRIPTORS: ACCOUNTING - CLIENT ACCOUNTING; LEGAL - ESTATE PLANNING

DESCRIPTOR CODES: 10001128; 10005122

PUBLISHER: ViewPlan, Inc.; ViewPlan; IBM & compatibles (1Mb) (0-943293

ADDRESS: P.O. Box 8078  
San Diego, CA 92138-0788  
TEL.: 619-239-3141  
SAN: 668-3398

22/3,K/12 (Item 2 from file: 635)  
DIALOG(R)File 635:Business Dateline(R)  
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0441320 93-93861  
**Haemonetics reports \$0.28 per share for second quarter**  
Oliver, Stephen P  
Business Wire (San Francisco, CA, US) s1 p1  
PUBL DATE: 931018  
DATELINE: Braintree, MA, US WORD COUNT: 1,121

TEXT:

...blood. The company's systems address three important medical markets around which the company has focused its business: surgical blood salvage, blood component therapy and **automated plasma collection**.

Haemonetics Corporation  
Financial Summary  
(unaudited-in thousands, except per share **data**)

	Quarter Ended Oct. 2 1993	Sept. 26 1992	Six Months Ended Oct. 2 1993	Sept. 26 1992
Net revenues	\$ 62,620	\$ 53,071	\$121,135...	
...24,066 18,931				
Interest expense	(492)	(585)	(945)	(1,210)
Interest income	810	516	1,445	881
Other expense, net	(455)	(347)	(709)	(648)
<b>Income before taxes</b>	12,872	9,764	23,857	17,954
Taxes	4,892	3,759	9,067	6,749
Net income	\$ 7,980	\$ 6,005	\$ 14,790...	

...28,502

Profit Margins (percent):				
Gross profit	58.6	54.5	57.6	54.3
Operating income	20.8	19.2	19.9	18.6
<b>Income before taxes</b>	20.6	18.4	19.7	17.7
Taxes	7.8	7.1	7.5	6.6
Net income	12.7	11.3	12.2...	

...current  
maturities of  
long-term debt 7,021 2,961  
Other current liabilities 35,564 35,493  
Total current liabilities 42,585 38,454

Deferred income taxes 4,817 4,602

Long-term debt, net of  
current maturities 10,670 10,601  
Stockholders' equity 143,022 126,650

Total liabilities and  
stockholders...

22/3,K/13 (Item 3 from file: 635)  
DIALOG(R)File 635:Business Dateline(R)  
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0365283 93-15820  
**Computer Identics announces 1992 results**  
Wezniak, Frank J

PR Newswire (New York, NY, US) sl pl  
PUBL DATE: 930128  
DATELINE: Canton, MA, US WORD COUNT: 421

TEXT:

...all aspects of our business, from design to sales to manufacturing."

Computer Identics Corporation designs, manufactures and services bar code products and systems for factory **data collection** and material handling applications in warehousing, distribution and manufacturing environments.

COMPUTER IDENTICS CORPORATION  
1992 FINANCIAL RESULTS  
(In thousands of dollars except per share data)

	Three Months Ended 12/31/92	12/31/91	12 Months Ended 12/31/92	12/31/91
Revenue	\$6,347	\$6,122	\$21,973	\$20,641
<b>Income before taxes</b>	365	540	1,052	994
Provision for income <b>taxes</b>	14	20	177	234
Net income	\$351	\$520	\$875	\$760
Net income per common share	3 cents	5 cents	9 cents	8 cents
Weighted average...				

22/3,K/14 (Item 4 from file: 635)  
DIALOG(R)File 635:Business Dateline(R)  
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0265277 92-11579  
Haemonetics Reports Third Quarter Earnings  
Oliver, Stephen P.  
Business Wire (San Francisco, CA, US) sl pl  
PUBL DATE: 920116  
DATELINE: Braintree, MA, US WORD COUNT: 318

TEXT:

...blood. The company's systems address three important medical markets around which the company has focused its business: surgical blood salvage, blood component therapy and **automated plasma collection**.

	Haemonetics Corp. Financial Summary (Unaudited, in thousands, except per share data )			
	Quarters Ended Dec. 28, 1991	Dec. 29, 1990	Nine Months Ended Dec. 28, 1991	Dec. 29, 1990
Net revenues	\$ 45,016	\$ 41,648	\$128,374...	
...713 16,870				
Interest expense	(669)	(1,036)	(2,026)	(3,161)
Interest income	329	389	901	1,102
Other expense	(313)	(118)	(452)	(506)
<b>Income before taxes</b>	7,076	5,467	19,136	14,305
Taxes	2,477	1,859	6,698	4,864
Net income	\$ 4,599	\$ 3,608	\$ 12,438...	
...percent):				
Gross profit	53.0	pct. 47.5	pct. 50.6	pct. 47.2
Operating income	17.2	15.0	16.1	14.8
<b>Income before taxes</b>	15.7	13.1	14.9	12.5
Taxes	5.5	4.5	5.2	4.3
Net income	10.2	8.7	9.7...	

...current maturities of			
long-term debt	\$ 4,588	\$ 10,311	
Other current liabilities	32,166	24,918	
	-----	-----	
Total current liabilities	36,754	35,229	
	-----	-----	
Deferred income taxes	557	488	
Long-term debt, net of current maturities	24,621	14,494	
Stockholders' equity	82,352	67,543	
	-----	-----	
Total liabilities and stockholders' equity	\$144...		

22/3,K/15 (Item 5 from file: 635)  
DIALOG(R)File 635:Business Dateline(R)  
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0263992 92-10291  
**Egghead Discount Software Provides Software Solutions to Tax Payers Preparing Federal and State Returns**  
McKenzie, Megan  
Business Wire (San Francisco, CA, US) s1 p1  
PUBL DATE: 920114  
DATELINE: Issaquah, WA, US WORD COUNT: 1,143

TEXT:

... another important factor to consider: "Congress is now discussing more potential changes in tax laws than at anytime in the last decade. By using a personal computer to compile taxes, tax software can assimilate information quickly and interpret the new laws for the tax payer."

Because many tax-preparation programs offer similar features and competitive prices, Keys recommends that tax...

22/3,K/16 (Item 6 from file: 635)  
DIALOG(R)File 635:Business Dateline(R)  
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0245134 91-69080  
**Haemonetics Reports Gain; Net Revenues Up 15 Percent and Net Income Up 38 Percent**  
Oliver, Stephen P.  
Business Wire (San Francisco, CA, US) s1 p1  
PUBL DATE: 911017  
DATELINE: Braintree, MA, US WORD COUNT: 273

TEXT:

...blood. The company's systems address three important medical markets around which the company has focused its business: surgical blood salvage, blood component therapy, and automated plasma collection .

Haemonetics Corp.  
Financial Summary  
(Unaudited-in thousands, except per share data )

	Quarter Ended	Six Months Ended		
	Sept. 28,	Sept. 29	Sept. 28,	Sept. 29,
	1991	1990	1991	1990
Net revenues	\$43,235	\$37,673	\$83,358...	
...12,984 10,638				
Interest expense	(625)	(1,171)	(1,357)	(2,125)
Interest income	296	332	572	713
Other expense	(19)	(64)	(139)	(388)

<b>Income before taxes</b>	6,623	4,714	12,060	8,838
Taxes	2,318	1,603	4,221	3,005
<b>Net income</b>	4,305	3,111	7,800...	
...119 13,777				
Profit margins:				
Gross profit	49.8%	47.2%	49.3%	47.1%
Operating income	16.1%	14.9%	15.6%	14.7%
<b>Income before taxes</b>	15.3%	12.5%	14.5%	12.2%
Taxes	5.3%	4.2%	5.1%	4.2%
<b>Net income</b>	10.0%	8.3%	9.4...	
...current maturities of long-term debt	4,671	10,311		
Other current liabilities	31,059	24,918		
Total current liabilities	35,730	35,229		
Deferred income taxes	508	488		
Long-term debt, net of current maturities	17,821	14,494		
Stockholders' equity	76,405	67,543		
Total liabilities and stockholders' equity	130...			

22/3,K/17 (Item 7 from file: 635)  
 DIALOG(R)File 635:Business Dateline(R)

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0240342 91-64240

Data-Design Laboratories Inc. Announces Fourth-Quarter and Fiscal 1991 Results

Steel, Alan R.

Business Wire (San Francisco, CA, US) s1 pl

PUBL DATE: 910926

DATELINE: Cucamonga, CA, US WORD COUNT: 485

TEXT:

... The company indicated that its 1991 Annual Report should be mailed on or before Oct. 4, 1991.

DDL is primarily engaged in the fabrication and **assembly** of printed circuit boards for the **computer**, communications and instrumentation industries.

DATA -DESIGN LABORATORIES INC.

OPERATING HIGHLIGHTS

(Dollars in thousands except per share amounts)

	Three Months Ended June 30, 1991	Year Ended June 30, 1990	1991	1990...
...902) (4,058) (4,365)				
Gain on termination of pension plan 2,827/a -- 3,577/a --				
Gain on sale of marketable securities -- -- -- 2,826				
<b>Income tax</b> (expense) benefit -- (103) 990/a (103)				
Loss from continuing operations (5,147) (2,128) (12,644) (5,980)				
Income (loss) from discontinued operations (6,235...)				

22/3,K/18 (Item 8 from file: 635)  
 DIALOG(R)File 635:Business Dateline(R)

(c) 1999 Bell & Howell. All rts. reserv.

0226880 91-49866

Haemonetics Reports Gain  
Oliver, Stephen P.  
Business Wire (San Francisco, CA, US) sl pl  
PUBL DATE: 910722  
DATELINE: Braintree, MA, US WORD COUNT: 270

TEXT:

... of blood. The company's systems address three important medical markets around which the company has focused its business: surgical blood salvage, component therapy, and automated plasma collection.

Haemonetics Corp.

Financial Summary

(Unaudited-in thousands, except per share data )

	Quarters Ended		
	June 29, 1991	June 30, 1990	
Net revenues	\$40,123	\$34,693	
Cost of goods sold	20,539	18,378	
Gross profit	19...		
...Total operating expenses	13,571	11,294	
Operating income	6,013	5,021	
Interest expense	(732)	(954)	
Interest income	276	381	
Other expense	(120)	(324)	
Income before taxes	5,437	4,124	
Taxes	1,903	1,402	
Net income	3,534	2,722	
Net income per share	\$ 0.25	\$ 0.20	
Weighted average number of shares	13,981	13,777	
Profit margins:			
Gross profit	48.8%	47.0%	
Operating income	15.0%	14.5%	
Income before taxes	13.6%	11.9%	
Net income	8.8%	7.8%	
Balance Sheet Data:		June 29, 1991	March 30, 1991
Current assets:			
Cash	1,182	1...	
...current maturities			
of long-term debt	5,016	10,311	
Other current liabilities	27,010	24,918	
Total current liabilities	32,026	35,229	
Deferred income taxes	477	488	
Long-term debt, net of current maturities	13,753	14,494	
Stockholders' equity	73,429	67,543	
Total liabilities and stockholders' equity	119...		

22/3/K/19 (Item 9 from file: 635)  
DIALOG(R)File 635:Business Dateline(R)  
(c) 1999 Bell & Howell. All rts. reserv.

0192786 91-14180

In Marlborough, More Revenue and Parking

Duffy, Robert  
Boston Business Journal (Boston, MA, US), v10 n50 s1 p8  
PUBL DATE: 910204  
DATELINE: Marlborough, MA, US WORD COUNT: 447

TEXT:

...backlog and then switched back to cheaper systems.

For example, Everett tapped MMA's tax delinquency service to reduce its \$2.5 million in outstanding property taxes. In one year Everett

collected \$1.9 million in delinquent taxes. But after getting the situation under control, the town switched its **automated** biking to **Arlington Data Corp.**

Frank Lewis, Everett's tax **collector**, said the other company's bid was \$25,000 cheaper than MMA's, so it was no longer cost-effective to go with MMA.

Even...

22/3,K/20 (Item 1 from file: 484)  
DIALOG(R)File 484:Periodical Abstracts Plustext  
(c) 1999 Bell & Howell. All rts. reserv.

03756390 SUPPLIER NUMBER: 98243164 (USE FORMAT 7 OR 9 FOR FULLTEXT)  
**Agriculture and the changing nation-state: Implications for policy and political economy**  
Bonnen, James T; Hedley, Douglas D; Schweikhardt, David B  
American Journal of Agricultural Economics (AAE), v79 n5, p1419-1428  
1997  
ISSN: 0002-9092 JOURNAL CODE: AAE  
DOCUMENT TYPE: Feature  
LANGUAGE: English RECORD TYPE: Fulltext; Abstract  
WORD COUNT: 6463

TEXT:

... longer a sovereign decision" (Guehenno, p. 10). This abstractness further erodes the nation-state's capacity to regulate its territorial borders, claim value-added and **income taxes**, or even **collect** accurate trade statistics (Ohmae, p. 39). Instantaneous **electronic** transfers of cash, both legal and illegal, defy any nation's **data collection** and regulatory reach (Kobrin).

In the face of capital mobility and the growing abstractness of economic activity, the nation-state now faces what the British...

22/3,K/21 (Item 2 from file: 484)  
DIALOG(R)File 484:Periodical Abstracts Plustext  
(c) 1999 Bell & Howell. All rts. reserv.

02804975 SUPPLIER NUMBER: 96174195 (USE FORMAT 7 OR 9 FOR FULLTEXT)  
**How to save the world: The case for a global flat tax**  
Schwenninger, Sherle R  
Nation (GTNA), v262 n19, p16-18  
May 13, 1996  
ISSN: 0027-8378 JOURNAL CODE: GTNA  
DOCUMENT TYPE: Feature  
LANGUAGE: English RECORD TYPE: Fulltext; Abstract  
WORD COUNT: 2018 LENGTH: Long (31+ col inches)

TEXT:

... A global flat tax would also be practical in that it would be easy and relatively inexpensive to collect -- much more so than the corporate **income tax** or even normal tariffs on internationally traded goods. The \$1.23 trillion traded on the world's currency exchanges each day is transacted on the world's most sophisticated **data** network. Technically, such a tax, then, would be quite easy to **collect** through the **computer** systems of the regulated and licensed banks and financial houses that make and record each trade. Financial institutions engaged in foreign exchange trading would be...

22/3,K/22 (Item 3 from file: 484)  
DIALOG(R)File 484:Periodical Abstracts Plustext  
(c) 1999 Bell & Howell. All rts. reserv.

02424978 (USE FORMAT 7 OR 9 FOR FULLTEXT)

**The assessment of end-user training and needs**  
Nelson, R Ryan; Whitener, Ellen M; Philcox, Henry H  
Communications of the ACM (ACM), v38 n7, p27-39

Jul 1995  
ISSN: 0001-0782 JOURNAL CODE: GACM

DOCUMENT TYPE: Feature  
LANGUAGE: English RECORD TYPE: Fulltext; Abstract  
WORD COUNT: 6976 LENGTH: Long (31+ col inches)

TEXT:

... income information provided by their employers, banks, stockbrokers and other financial entities. Prior to AUR, the batch approach required case workers to order copies of **income tax** returns and supporting documents and to calculate and compare reported income. If they found that discrepancies were sufficiently large, case workers would open a file to attempt to reconcile the reports or to calculate and collect **taxes** on the underreported **income**. The AUR project has focused on designing and implementing an **information** system to accomplish much of the **information gathering**, income comparison, and discrepancy-calculation activities electronically.

From the initial stages of the project, IS professionals, end users, and trainers recognized their interdependence and worked cooperatively to design and implement the AUR...

22/3,K/23 (Item 1 from file: 647)  
DIALOG(R)File 647: CMP Computer Fulltext  
(c) 1999 CMP. All rts. reserv.

01122143 CMP ACCESSION NUMBER: HPC19970401S0059  
**Leaving Tracks on the Net-Can your privacy be protected in cyberspace?**  
John Eckhouse  
HOME PC, 1997, n 404, PG91  
PUBLICATION DATE: 970401  
JOURNAL CODE: HPC LANGUAGE: English  
RECORD TYPE: Fulltext  
SECTION HEADING: Feature  
WORD COUNT: 2234

... if someone collects everything you've ever discussed in newsgroups, a pretty good profile of you emerges.

Even if you've never spent a minute **online**, though, there's a startling amount of **information** about you on the Net, courtesy of **data brokers** who've **collected** it from phone directories; birth, marriage, divorce, death, **property tax** and driver's license records; credit bureaus; and other assorted databases. Most of this information is free and open to all comers; the rest can...

22/3,K/24 (Item 1 from file: 268)  
DIALOG(R)File 268: Banking Information Source  
(c) 1999 Bell & Howell. All rts. reserv.

00309220 (USE FORMAT 7 FOR FULLTEXT)  
**Before computerizing your business, read this**  
Davidson, Brad  
ABA's Financial Services Industry Trends, v57, p8-11, Jul/Aug 1996  
DOCUMENT TYPE: Newsletter Article ARTICLE TYPE: Feature LANGUAGE:  
English RECORD TYPE: Abstract Fulltext  
WORD COUNT: 02357

... market value estimates if circumstances warranted. We needed to give these people the research tools they needed. The solution was document imaging -- providing customers with **electronic "pictures"** of the primary documents **gathered** from the issuer (**financial statements**, **property tax bills**, partnership agreements, and the like).

Using Lotus Notes Document Imaging ("LN:DI"), customers can print out these documents -- right at their own personal computer...

22/3,K/25 (Item 2 from file: 268)  
DIALOG(R)File 268:Banking Information Source  
(c) 1999 Bell & Howell. All rts. reserv.

00239333  
IRS picks 1st Chicago and NationsBank to build electronic payment systems  
Epper, Karen  
American Banker, p1:3, Oct 11, 1994 DOCUMENT TYPE: Newspaper Article  
ARTICLE TYPE: News LANGUAGE: English RECORD TYPE: Abstract

ABSTRACT: First Chicago Corp and NationsBank Corp have snared contracts with the Treasury Department under which they will serve as "financial agents" that collect tax payments on behalf of the IRS, using electronic data interchange and funds-transfer technologies now chiefly employed in the remote-banking field. Under the arrangement, companies and individuals will be able to pay their taxes electronically, using personal computers, telephones, mainframe computers and point-of-sale terminals.

22/3,K/26 (Item 1 from file: 810)  
DIALOG(R)File 810:Business Wire  
(c) 1999 Business Wire . All rts. reserv.

0259659 BW625

EGGHEAD DISCOUNT SOFT 2: Egghead Discount Software provides software solutions to tax payers preparing federal and state returns

January 14, 1992

Byline: Business Editors, Computer Writers

...another important factor to consider: "Congress is now discussing more potential changes in tax laws than at anytime in the last decade. By using a personal computer to compile taxes , tax software can assimilate information quickly and interpret the new laws for the tax payer."

Because many tax-preparation programs offer similar features and competitive prices, Keys recommends that tax...

File 674:Computer News Fulltext 1989-1999/Aug W4  
 (c) 1999 IDG Communications  
 File 624:McGraw-Hill Publications 1985-1999/Aug 31  
 (c) 1999 McGraw-Hill Co. Inc  
 File 9:Business & Industry(R) Jul 1994-1999/Sep 03  
 (c) 1999 Resp. DB Svcs.  
 File 88:Gale Group Business A.R.T.S. 1976-1999/Sep 03  
 (c) 1999 The Gale Group  
 File 47:Gale Group Magazine DB(TM) 1959-1999/Sep 03  
 (c) 1999 The Gale group  
 File 75:TGG Management Contents(R) 86-1999/Aug W4  
 (c) 1999 The Gale Group  
 File 111:TGG Natl.Newspaper Index(SM) 1979-1999/Sep 03  
 (c) 1999 The Gale Group  
 File 612:Japan Economic Newswire(TM) 1984-1999/Sep 02  
 (c) 1999 Kyodo News  
 File 635:Business Dateline(R) 1985-1999/Aug 30  
 (c) 1999 Bell & Howell  
 File 484:Periodical Abstracts Plustext 1986-1999/Aug W3  
 (c) 1999 Bell & Howell  
 File 647:CMP Computer Fulltext 1988-1999/Aug W4  
 (c) 1999 CMP  
 File 268:Banking Information Source 1981-1999/Aug W5  
 (c) 1999 Bell & Howell  
 File 625:American Banker Publications 1981-1999/Sep 03  
 (c) 1999 American Banker  
 File 20:World Reporter 1997-1999/Sep 03  
 (c) 1999 The Dialog Corporation plc  
 File 810:Business Wire 1986-1999/Feb 28  
 (c) 1999 Business Wire

Set	Items	Description
S1	1137809	TAX OR TAXES OR INLAND()REVENUE
S2	5391730	PREPAR? OR REPORT? OR FILE? ? OR FILING OR (FILL???)IN OR COMPLET?) (3N)(FORM? ? OR RETURN? ? OR DOCUMENT?)
S3	432311	S2(5N)(ELECTRONIC? OR AUTOMATE? OR AUTOMATION OR COMPUTER? OR DIGITAL? OR VIRTUAL OR INTERNET OR ONLINE OR ON()LINE)
S4	1876014	COLLECT? OR GATHER? OR COMPIL? OR ASSEMB?
S5	4700771	INFORMATION OR DATA OR (BANK? ? OR BROKERAGE? OR INTEREST - OR FINANCIAL OR MORTGAGE OR PAYROLL OR EMPLOYER) (3N)STATEMENT?
S6	28659	(MULTIPLE OR MANY OR DIVERSE OR PLURAL? OR MUTUAL()FUND? OR INVESTMENT?) (5N)STATEMENT? OR (W2 OR W()2 OR 1099 OR 1098)
S7	16531	CHARIT?(5N)(CONTRIBUTION? OR RECEIPT? OR DONATION?)
S8	31919	EFT OR EFTS OR ELECTRONIC?(1N) FUNDS (1N)TRANSFER? OR (ELEC- TRONIC OR E OR DIGITAL OR VIRTUAL) ()(CASH OR WALLET OR PURSE - OR MONEY ) OR ECASH OR EMONEY OR EPAYMENT?
S9	83093	(PAY? OR REFUND?) (15N)(ELECTRONIC? OR ONLINE OR ON()LINE OR INTERNET)
S10	4725196	S5 OR S6 OR S7
S11	105178	S8 OR S9
S12	13	S1(S)S3(S)S4(5N)S10(S).S11
S13	13	RD (unique items)
S14	7	S13 NOT (ROCK()HILL OR ALLIED() PAYROLL)
S15	32078	(ELECTRONIC? OR AUTOMATE? OR AUTOMATION OR COMPUTER? OR DI- GITAL? OR VIRTUAL OR INTERNET OR ONLINE OR ON()LINE) (5N)S4(5N- )S10
S16	368	S1(S)S15
S17	139	S16(S)S2
S18	61	(INCOME OR PROPERTY OR PERSONAL) (3N)S1(S)S15
S19	51	RD (unique items)
S20	37	S18 NOT PD=>970508
S21	30	S20 NOT (UNDERGROUND OR EVASION OR TOSHIBA)
S22	26	S21 NOT YEAR()END
		?

14/3,K/1 (Item 1 from file: 75)  
DIALOG(R)File 75:TGG Management Contents(R)  
(c) 1999 The Gale Group. All rts. reserv.

00130498 SUPPLIER NUMBER: 07917400 (USE FORMAT 7 FOR FULL TEXT)  
**Futureworld tax: fearful issues and novel answers. (Wide World of Accountancy)**  
Colabella, Patrick R.; Maury, Mary D.; Manna, John S.  
The CPA Journal, v59, n10, p104(3)  
Oct, 1989  
ISSN: 0732-8435 LANGUAGE: English RECORD TYPE: Fulltext; Abstract  
WORD COUNT: 2157 LINE COUNT: 00176

... aggregation of pertinent data from third parties, such as employers, banks and other financial institutions in the IRS's computer, which would then calculate the **taxes** due. This system presupposes that only standard deductions could be used. The plan would relieve taxpayers of the burden of filing by having them submit a postcard if they want to participate. They would then be given the opportunity to verify the IRS **tax** calculation and notify the IRS of discrepancies or disagreements. The concept is intriguing, but it can effectively grant the government a blank check. Many taxpayers would not know enough to question or challenge the government-determined **tax** under this system. They will be at the mercy of the IRS's computer and the adequacy of the information it gathers.

**Electronic Filing of Taxpayer Prepared Returns**

Electronic filing of **tax** returns is now available to taxpayers expecting a **refund**. It is expected to be expanded to reach 40% of taxpayers, or as many as 30 million couples and individuals. The goals of the system...

...has indicated that a relatively low percentage of eligible persons have utilized the system, but that could change overnight. The part electronics will play in **tax** filings can readily be seen. However, is it a step in the right direction? Whatever the answer, it probably is inevitable.

Streamlining and Enforcing Compliance...

14/3,K/2 (Item 1 from file: 484)  
DIALOG(R)File 484:Periodical Abstracts PlusText  
(c) 1999 Bell & Howell. All rts. reserv.

03147364 SUPPLIER NUMBER: 97058007 (USE FORMAT 7 OR 9 FOR FULLTEXT)  
**Commissioner calls on more CPAs to file electronically**  
Anonymous  
Journal of Accountancy (JAC), v183 n2, p23-24  
Feb 1997  
ISSN: 0021-8448 JOURNAL CODE: JAC  
DOCUMENT TYPE: News  
LANGUAGE: English RECORD TYPE: Fulltext; Abstract  
WORD COUNT: 502

TEXT:

... 23 million taxpayers who use form 1040EZ to file using the telephone in 1997. She also said that last year over 10 million taxpayers had **refunds** deposited in their bank accounts and she suggested more businesses promote the direct deposit refunds.

(Graph Omitted)

Captioned as: **Taxes States Collect**  
More **information** on the various IRS **electronic payment** and **filing** systems is available on the IRS World Wide Web site at <http://www.irs.ustreas.gov>.

14/3,K/3 (Item 1 from file: 647)  
DIALOG(R)File 647:cmp Computer Fulltext  
(c) 1999 cmp. All rts. reserv.

01022154 CMP ACCESSION NUMBER: WIN19940601S1885

**Mobile Mail Keeps Remote Users in the Loop (E-Mail Software)**

Hailey Lynne McKerry  
WINDOWS MAGAZINE, 1994, n<sup>o</sup> 6 , 076  
PUBLICATION DATE: 940601  
JOURNAL CODE: WIN LANGUAGE: English  
RECORD TYPE: Fulltext  
SECTION HEADING: New Products

**TEXT:**

... Mobile Data, cellular and landline modems. The package includes scripts for more than 70 popular modems and supports background operation. A preview function lets you **gather information** about incoming messages, such as estimated transmission time, subject, priority, author, size and attachment names. cc:Mail Mobile offers built-in support for reconciliation when...

...simultaneously and store flagged messages in mail folders. All off-line actions are automatically reconciled. You can create a remote post office on any Windows **computer**, then transfer **files** with transfer software or via a diskette. You can perform mail functions, including printing and saving messages, off-line without logging onto your workstation. Portable ...day basis for inclusion in later reviews. Avantos Performance Systems' Review Writer uses a Quick Build mode that leads the review writer through questions that **gather key information** and a Document mode for more experienced users. Users click on icons to get help in specific areas. The program can import goal and performance...

...Money Has Gotten Simpler MECA Software has introduced a Windows version of its Managing Your Money (MYM), to help you manage your banking, investments and **taxes**. The new version adds a SmartDesk graphical navigator. The SmartDesk appears on-screen as a picture of a traditional office setting, complete with desk, bookcase...

...SmartDesk. The MYM checkbook allows you to enter a check on either an on-screen check register or a graphical representation of a check. The **tax** portion of the program includes all the primary **tax** forms and schedules. Funds that you record in the check register as taxable are automatically recorded in the correct **tax** schedule. You can open multiple **tax** windows to view current **tax** status and perform what-if scenarios. MYM's Investment Analysis window lets you look at the status of your investments. Views include simple and annual...for individuals, relatives, friends and clients. The Debt Analyzer Price: \$25 Contact: Insight Software Solutions, 801-295-1890, fax 801-299-1781 Circle Inquiry 585 **Pay** Your Employees **Electronically** DacEasy Instant **Payroll** from DacEasy Inc. and Instinctive **Payroll** from SVS Co. Inc. let you automate your payroll ledger. Instant Payroll automatically calculates federal, state and local **taxes** for hourly, salaried and commissioned employees. The AutoPay function processes a payroll for multiple frequencies and multiple pay types simultaneously. Instant Payroll also helps you...

...Instinctive Payroll calculates three types of hourly rates : regular time, overtime and double-time. It also handles salary, commissions by percentage and commission plus base **pay**. The software allows you to process bonus **pay** and **electronically file** direct deposits. It can also be configured for multiple **pay** periods and allows unlimited benefits, deductions, additions and tips. Tips can be recorded by allocated tips or tips in addition to gross **pay**. Instinctive **Payroll** also lets you issue and track **payroll** advances. Instinctive **Payroll** prints information on preprinted forms on tractor-fed or laser-printer checks. It also includes **electronic tax filing** to transfer **tax** deposits directly to the bank. DacEasy Instant **Payroll** Price: \$49.95 Contact: DacEasy Inc., 800-DAC-EASY, 214-248-0205 Circle Inquiry 586 Instinctive Payroll Price: \$59.95 Contact: SVS Co. Inc., 800...

0065711

Chase Creates Portfolio Unit

American Banker - November 6, 1987; Pg. 39; Vol. 152, No. 219

WORD COUNT: 60

TEXT:

...Co. has formed a portfolio servicing division in Paramus, N.J.

The division provides customized processing for finance companies. Services include credit and document review, **payment**, **tax** and buyouts and maturities processing, **collection**, on-line access to **data**, and special **reporting** packages. Jay Shaffer, senior vice president, said the portfolio division can serve companies of all sizes.

14/3,K/5 (Item 1 from file: 20)

DIALOG(R)File 20:World Reporter

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03381951 (USE FORMAT 7 OR 9 FOR FULLTEXT)

New Software Helps Government Cut Costs, Automate Tax Payments

BUSINESS WIRE

November 09, 1998

JOURNAL CODE: WBWE LANGUAGE: English RECORD TYPE: FULLTEXT

WORD COUNT: 754

(USE FORMAT 7 OR 9 FOR FULLTEXT)

... Nearly 200 agencies already use the system.

To meet the requirements of multiple federal agencies, FLS developed a solution that directly addresses the unique payroll **tax** automation needs of government, including **data collection**, due date assignments, **payment** generation, production of returns and **electronic filing**. FLS delivered the application on time to coincide with the beginning of a new quarterly filing period, having only a six-month window for development...

14/3,K/6 (Item 2 from file: 20)

DIALOG(R)File 20:World Reporter

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02989193

Featured News from Business Week Online's Daily Briefing

PR NEWSWIRE

October 01, 1998

JOURNAL CODE: WPRW LANGUAGE: English RECORD TYPE: FULLTEXT

WORD COUNT: 486

... GET PERSONAL (<http://enterprise.businessweek.com>) If you have a small business and have been tempted to use a personal check or credit card to **pay** a business bill, Business Week **Online** has a word of advice: Don't. Any time you commingle personal and business assets, you can bring on the IRS and scare off partners. Business bills you pay with your personal assets instantly become your personal responsibility if your company can't pay. **Tax** deductions might easily be lost. Even the future creditworthiness of your enterprise could be imperiled, because if you ever need outside capital, bankers and investors...

... track of SEC filings, you can find out what insiders are buying and selling. It's not easy, even with the advent of the EDGAR **filing** system (**Electronic Data Gathering and Retrieval**). BW Online's Sam Jaffe looks at [insidertrader.com](http://insidertrader.com), a site that does the scut work of keeping track of SEC filings... Plus...

... for Institutional Investor before starting the site. Written by

reporters from Business Week's worldwide bureau system as well as by a dedicated staff of **online reporters**, BW Online's Daily Briefing presents important stories every day that you won't find anywhere else. From the world's best-selling business publication, BW Online...

14/3,K/7 (Item 3 from file: 20)

DIALOG(R)File 20:World Reporter

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01372825 (USE FORMAT 7 OR 9 FOR FULLTEXT)

**As Income Tax Deadline Looms, Citizens Don't Realize How Good They've Got It**

BUSINESS WIRE

April 13, 1998 17:23

JOURNAL CODE: WBWE LANGUAGE: English RECORD TYPE: FULLTEXT

WORD COUNT: 480

(USE FORMAT 7 OR 9 FOR FULLTEXT)

Are you one of those folks tearing your hair out over a box of receipts, having procrastinated on doing your **taxes** until the last minute? Filing your income **tax** on April 15 may be an annual headache for you, but for the employees of Ceridian **Tax** Service in Fountain Valley, California, April 15 is just another day in the annual cycle of filing payroll **tax** returns and making payroll **tax** payments on behalf of employers. More than 650 employees at Ceridian **Tax** Service live and breathe payroll **tax** compliance with a plethora of federal, state and local regulations every day of the year. Ceridian **Tax** Service files payroll **tax** returns on behalf of employers and employees and processes payments to the Internal Revenue Service (IRS), the Social Security Administration and the vast number of other municipalities and other regulatory bodies that may want a piece of your paycheck. "**Tax** deadlines like April 15 come four times a year in our business," said Jim Corcoran, president of Ceridian **Tax** Service. "We receive **tax** deposits from employers and process and deposit those funds to various agencies every day. At the end of each quarter, we reconcile 45,000 customers' accounts and file returns with thousands of agencies. It's our job to monitor ever-changing payroll **tax** laws and regulations as well as adopt new technologies to ensure that our customers will be in compliance with federal, state and local employment **tax** requirements." In 1997, Ceridian **Tax** Service processed more than 2.6 million **electronic payroll tax** transactions, representing **payroll tax** deposits of more than \$98 billion dollars. They filed nearly 800,000 quarterly payroll **tax** returns with the IRS and approximately 6,000 other agencies that collect payroll **taxes**. All of Ceridian **Tax** Service's **payroll tax** services are fully compliant with the recently implemented **electronic filing** requirements of the IRS and various state and local jurisdictions. "Because of our expertise in electronic processing, Ceridian **Tax** Service representatives routinely participate on IRS, state and local agency development teams, including the **Electronic Federal Tax Payment System (EFTPS)** and the pilot program for the IRS' 941 **Electronic Data Interchange (EDI)** project," according to Luanne Sullivan, director of the **Tax** Agency Product Group at Ceridian **Tax** Service. "More and more agencies are moving to electronic technology for **collecting data** and funds as well as filing returns. We work diligently to be a leader in electronic commerce and electronic data interchange applications and processes, and are asked to share our experience and expertise with many of our agency partners." "Many businesses are choosing to outsource their payroll and **tax** filing rather than be forced to respond to the hundreds of new requirements and regulations that take effect each year, such as specific state reporting technology requirements," said Corcoran. And that means the employees at Ceridian **Tax** Service will continue to work hard at filing and paying your payroll **taxes** for years to come.

About Ceridian

Ceridian Employer Services is the source for leading outsourced and in-house HRMS, payroll and tax filing solutions. The..

22/3,K/1 (Item 1 from file: 9)  
DIALOG(R)File 9:Business & Industry(R) Jul  
(c) 1999 Resp. DB Svcs. All rts. reserv.

01473570 (USE FORMAT 7 OR 9 FOR FULLTEXT)  
**CALIFORNIA COMPANY TO BUY EUGENE, ORE., COMPUTER DISK FACTORY**  
(HMT Technology has agreed to buy the Computer Memory Disk plant in Eugene,  
OR for about \$5mil)  
Register-Guard , p N/A  
April 24, 1996  
DOCUMENT TYPE: Regional Newspaper ISSN: 0739-8557 (United States)  
LANGUAGE: English RECORD TYPE: Fulltext  
WORD COUNT: 983

ABSTRACT:

...disk production and create about 300-500 new jobs. Any new construction or major new equipment set up by HMT could be exempt from local **property taxes** for three years. HMT buys polished, hard-drive, thin-film memory disks from CMD and other producers, magnetically encodes the disks with **data**, then sells the disks to **computer** producers for **assembly**. HMT CEO Ronald Schauer said his firm differentiated itself from rivals by making high-end disks with large memories. DiskTrend Inc. VP Bob Catzive noted...

22/3,K/2 (Item 1 from file: 88)  
DIALOG(R)File 88:Gale Group Business A.R.T.S.  
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03915896 SUPPLIER NUMBER: 18268094 (USE FORMAT 7 OR 9 FOR FULL TEXT)  
**How to save the world: the case for a global flat tax.**  
Schwenninger, Sherle R.  
The Nation, v262, n19, p16(3)  
May 13, 1996  
ISSN: 0027-8378 LANGUAGE: English RECORD TYPE: Fulltext; Abstract  
WORD COUNT: 2126 LINE COUNT: 00172

... A global flat tax would also be practical in that it would be easy and relatively inexpensive to collect - much more so than the corporate **income tax** or even normal tariffs on internationally traded goods. The \$1.23 trillion traded on the world's currency exchanges each day is transacted on the world's most sophisticated **data** network. Technically, such a tax, then, would be quite easy to **collect** through the **computer** systems of the regulated and licensed banks and financial houses that make and record each trade. Financial institutions engaged in foreign exchange trading would be...

22/3,K/3 (Item 2 from file: 88)  
DIALOG(R)File 88:Gale Group Business A.R.T.S.  
(c) 1999 The Gale Group. All rts. reserv.

03644049 SUPPLIER NUMBER: 17333310 (USE FORMAT 7 OR 9 FOR FULL TEXT)  
**The assessment of end-user training needs. (information technology) (End-User Training and Learning)**  
Nelson, R. Ryan; Whitener, Ellen M.; Philcox, Henry H.  
Communications of the ACM, v38, n7, p27(13)  
July, 1995  
ISSN: 0001-0782 LANGUAGE: English RECORD TYPE: Fulltext; Abstract  
WORD COUNT: 7507 LINE COUNT: 00631

... income information provided by their employers, banks, stockbrokers and other financial entities. Prior to AUR, the batch approach required case workers to order copies of **income tax** returns and supporting documents and to calculate and compare reported income. If they found that discrepancies were sufficiently large, case workers would open a file to attempt to reconcile the reports or to calculate and collect **taxes** on the underreported **income**. The AUR project has focused on designing and implementing an **information** system to accomplish much of the **information**

gathering, income comparison, and discrepancy-calculation activities electronically.

From the initial stage of the project, IS professionals, end users, and trainers recognized their interdependence and worked cooperatively to design and implement the AUR...

22/3,K/4 (Item 3 from file: 88)  
DIALOG(R)File 88:Gale Group Business A.R.T.S.  
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01706673 SUPPLIER NUMBER: 03742485 (USE FORMAT 7 OR 9 FOR FULL TEXT)

**Some computer-based developments in sociology.**

Heise, David R.; Simmons, Roberta G.

Science, v228, p428(6)

April 26, 1985

CODEN: SCIEAS ISSN: 0036-8075 LANGUAGE: English

RECORD TYPE: Fulltext

WORD COUNT: 4643 LINE COUNT: 00454

... starts with a sample of several thousand individuals who are hypothetically moved forward in time several years, in order to explore effects of various negative **income tax** policies on marriage, work, earnings, and savings. The model uses equations from prior research that describe relations among the relevant variables. In this case a **computer** is required for the simulation because extensive computations are being conducted on a large sample of cases.

#### - Data Collection

Although the most obvious impact of the **computer** in sociology has involved data analysis, **data collection** has been revolutionized as well. Computers aid in constructing good random sampling designs for sample surveys so that one can generalize with

22/3,K/5 (Item 4 from file: 88)  
DIALOG(R)File 88:Gale Group Business A.R.T.S.  
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01702387 SUPPLIER NUMBER: 03620876 (USE FORMAT 7 OR 9 FOR FULL TEXT)

**Can software do the hard parts? (tax preparation)**

Changing Times, v39, p33(3)

Feb, 1985

CODEN: CNGTA ISSN: 0009-143X LANGUAGE: English RECORD TYPE:

Fulltext

WORD COUNT: 953 LINE COUNT: 00085

A **personal tax** software program could save you time or money or both, but don't count on it. The software won't give **personal tax** advice, so you need to be familiar with the tax rules. You'll have to spend time learning to use it and keying in **data** or **compiling** your records on paper so you can enter the numbers that the **computer** asks for. What's more, a **personal tax** program will rarely do your state return.

Tax software ranges from about \$50 to \$300 for a program that is likely to become obsolete in...

22/3,K/6 (Item 1 from file: 47)  
DIALOG(R)File 47:Gale Group Magazine DB(TM)  
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04473559 SUPPLIER NUMBER: 18179871 (USE FORMAT 7 OR 9 FOR FULL TEXT)

**Instant, low-cost income tax information. (income tax-related Web sites)**

**(PC Week Navigator) (Directory) (Brief Article)**

PC Week, v13, n14, p59(1)

April 8, 1996

DOCUMENT TYPE: Directory Brief Article ISSN: 0740-1604 LANGUAGE:

English RECORD TYPE: Fulltext

WORD COUNT: 297 LINE COUNT: 00042

TEXT:

If you have not started compiling your 1995 tax documents, the Internet plays host to numerous sites containing information on a variety of tax-related issues, including personal and business filing procedures, archives of forms in a choice of file formats, and tips on how to minimize your tax liability.

22/3,K/7 (Item 2 from file: 47)

DIALOG(R)File 47:Gale Group Magazine DB(TM)  
(c) 1999 The Gale group. All rts. reserv.

03727346 SUPPLIER NUMBER: 11963403 (USE FORMAT 7 OR 9 FOR FULL TEXT)  
**Personal Tax Filer.** (computer software from Disk-Count Software) (Software Review) (one of eight evaluations of tax-preparation software in 'Tax Preparation Software for Many Happy Returns') (Evaluation)

Smith, Jan  
PC-Computing, v5, n3, p300(1)

March, 1992

DOCUMENT TYPE: Evaluation ISSN: 0899-1847 LANGUAGE: ENGLISH

RECORD TYPE: FULLTEXT; ABSTRACT

WORD COUNT: 1870 LINE COUNT: 00144

2) EASE OF USE. The program is little more than a collection of electronic IRS forms and a calculator. It starts with your personal information and W-2s, and then walks you through the 1040 and various schedules and forms. Or you can scroll through a menu to choose which form or worksheet you want. Unlike most other programs, Personal Tax Filer has no function key or other means to move you from one form to its supporting forms or worksheets--you have to keep track...

...have to copy data manually. The manual, which is printed from the disk, contains instructions on using the software and very brief guidance on forms. Personal Tax Filer does not import data from personal finance packages. Technical support is available during regular business hours, central standard time.

(3) WHAT-IFs. The program...

22/3,K/8 (Item 3 from file: 47)

DIALOG(R)File 47:Gale Group Magazine DB(TM)  
(c) 1999 The Gale group. All rts. reserv.

02932688 SUPPLIER NUMBER: 06013728  
**Mac tax tools: three ways to face the rigors of tax planning and 1040 preparation.**

Mann, Steve  
Macworld, v4, n2, p189(5)

Feb, 1987

ISSN: 0741-8647 LANGUAGE: ENGLISH RECORD TYPE: ABSTRACT

ABSTRACT: Federal income tax preparation software for Macintosh computers comes in three categories: personal financial management software for collecting data; tax preparation software; and tax planning or forecasting software. Financial management software sometimes comes in the form of templates for spreadsheets, such as Excel and...

22/3,K/9 (Item 1 from file: 75)

DIALOG(R)File 75:TGG Management Contents(R)  
(c) 1999 The Gale Group. All rts. reserv.

00179747 SUPPLIER NUMBER: 17167958 (USE FORMAT 7 FOR FULL TEXT)  
**Check fraud: the challenge to stem soaring losses.** (includes related article)

Bock, Charles J., Jr.  
Bank Management, v71, n3, p60(6)

May-June, 1995  
ISSN: 1049-1775 LANGUAGE: English RECORD TYPE: Fulltext; Abstract  
WORD COUNT: 3335 LINE COUNT: 00295

... is maintained by the Mortgage Asset Research Institute Inc.  
The medical profession maintains a database for the use of health-care providers through a Medical **Information** Bureau, and **property - and tax -insurance collectors** also share **information**.

Given that fraud perpetrators are using technology with great success, we need to develop additional **automated** systems to prevent fraud against our institutions, and we must share technological insights at every opportunity.

To counter check fraud, banks must use the same...

22/3,K/10 (Item 2 from file: 75)  
DIALOG(R)File 75:TGG Management Contents(R)  
(c) 1999 The Gale Group. All rts. reserv.

00164706 SUPPLIER NUMBER: 14476921 (USE FORMAT 7 FOR FULL TEXT)  
**State individual income taxes: basic concepts and planning considerations.**  
**(High Net Worth: The Accoutrements of Success) (Cover Story)**  
Persellin, Mark B.; Novak, Shawn  
The CPA Journal, v63, n9, p36(7)  
Sept, 1993  
DOCUMENT TYPE: Cover Story ISSN: 0732-8435 LANGUAGE: English  
RECORD TYPE: Fulltext; Abstract  
WORD COUNT: 3679 LINE COUNT: 00357

... tax on individuals. For individuals to minimize their income tax burden, serious consideration must be given to planning for these non-Federal assessments.

The state **income tax** environment has become increasingly complex and contentious over the last several years. Most states have stepped up their enforcement efforts to **collect** additional taxes from both resident and nonresident taxpayers. Through the extensive use of **computers** and **information** sharing with other states and the Federal government, state tax authorities are aggressively assessing deficiencies against noncomplying individual taxpayers, particularly nonresidents. In the search for...

...state governments continue to struggle with their fiscal problems, individuals must be prepared to deal with both greater complexity and increased liability exposure for state **income taxes**.

State Jurisdiction to Tax and "Nexus"  
The U.S. Constitution imposes certain limitations on a state's authority to impose taxes on individuals and other...

22/3,K/11 (Item 1 from file: 635)  
DIALOG(R)File 635:Business Dateline(R)  
(c) 1999 Bell & Howell. All rts. reserv.

0697625 96-54968  
**Gentle giant or ruthless investor?**  
Poppe, David  
Florida Trend (St Petersburg, FL, US), v39 n1 p94  
PUBL DATE: 960500  
DATELINE: West Palm Beach, FL, US, South Atlantic WORD COUNT: 1,799

TEXT:

... hour-and-a-half to two hours per every property we buy." Heitmeyer says Capital Asset has advantages over its competitors, such as a superior **data gathering** and **computer** system. He says Capital Asset's 95 employees can track the **property tax** records on any parcel in Florida going back seven years, without leaving the office.

Unaudited financial statements that Capital Asset has been quietly circulating among...

File 16:Gale Group PROMT(R) 1972-1999/Sep 03  
(c) 1999 The Gale Group  
File 621:Gale Group New Prod.Annou.(R) 1985-1999/Sep 03  
(c) 1999 The Gale Group  
File 636:Gale Group Newsletter DB(TM) 1987-1999/Sep 03  
(c) 1999 The Gale Group  
File 148:Gale Group Trade & Industry DB 1976-1999/Sep 03  
(c) 1999 The Gale Group  
File 275:Gale Group Computer DB(TM) 1983-1999/Sep 03  
(c) 1999 The Gale Group  
File 813:PR Newswire 1987-1999/Apr 30  
(c) 1999 PR Newswire Association Inc  
File 15:ABI/INFORM(R) 1971-1999/Sep 01  
(c) 1999 Bell & Howell

Set	Items	Description
S1	1549701	TAX OR TAXES OR INLAND()REVENUE
S2	6937765	PREPAR? OR REPORT? OR FILE? ? OR FILING OR (FILL???)IN OR COMPLET?) (3N) (FORM? ? OR RETURN? ? OR DOCUMENT?)
S3	543474	S2(5N) (ELECTRONIC? OR AUTOMATE? OR AUTOMATION OR COMPUTER? OR DIGITAL? OR VIRTUAL OR INTERNET OR ONLINE OR ON()LINE)
S4	2004365	COLLECT? OR GATHER? OR COMPIL? OR ASSEMB?
S5	8441269	INFORMATION OR DATA OR (BANK? ? OR BROKERAGE? OR INTEREST - OR FINANCIAL OR MORTGAGE OR PAYROLL OR EMPLOYER) (3N)STATEMENT?
S6	34310	(MULTIPLE OR MANY OR DIVERSE OR PLURAL? OR MUTUAL()FUND? OR INVESTMENT?) (5N)STATEMENT? OR (W2 OR W()2 OR 1099 OR 1098)
S7	14847	CHARIT?(5N) (CONTRIBUTION? OR RECEIPT? OR DONATION?)
S8	47479	EFT OR EFTS OR ELECTRONIC?(1N)FUNDS (1N)TRANSFER? OR (ELEC- TRONIC OR E OR DIGITAL OR VIRTUAL) () (CASH OR WALLET OR PURSE - OR MONEY ) OR ECASH OR EMONEY OR EPAYMENT?
S9	130103	(PAY? OR REFUND?) (15N) (ELECTRONIC? OR ONLINE OR ON()LINE OR INTERNET)
S10	8460739	S5 OR S6 OR S7
S11	160349	S8 OR S9
S12	8	S1(S)S3(S)S4(5N)S10(S)S11
S13	7	RD (unique items)
		?

13/3,K/1 (Item 1 from file: 16)  
DIALOG(R)File 16:Gale Group PROMT(R)  
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01813718  
**Chase creates portfolio unit**  
American Banker November 6, 1987 p. 39  
ISSN: 0002-7561

... US) has formed a portfolio servicing div in Paramus, NJ. The div will provide customized processing for financing companies. Services include credit and document review, payment, tax and buyouts and maturities processing, collection, on-line access to data, and special reporting packages. ...

13/3,K/2 (Item 1 from file: 148)  
DIALOG(R)File 148:Gale Group Trade & Industry DB  
(c)1999 The Gale Group. All rts. reserv.

11086313 SUPPLIER NUMBER: 54768482  
**Customer seen as king in battle for broadband communications. (NATIONAL NEWS)**  
Cane, Alan  
Financial Times, 12  
June 2, 1999  
ISSN: 0307-1766 LANGUAGE: English RECORD TYPE: Citation

NAICS CODES: 334418 Printed Circuit Assembly (Electronic Assembly )  
Manufacturing; 514191 On -Line Information Services; 54121  
Accounting, Tax Preparation, Bookkeeping, and Payroll Services

13/3,K/3 (Item 2 from file: 148)  
DIALOG(R)File 148:Gale Group Trade & Industry DB  
(c)1999 The Gale Group. All rts. reserv.

09653988 SUPPLIER NUMBER: 19050595 (USE FORMAT 7 OR 9 FOR FULL TEXT)  
**Tax software vendors compete against IRS. (software for meeting IRS electronic tax filing requirements) (Government Activity)**  
Weston, Randy  
Computerworld, v31, n2, p45(2)  
Jan 13, 1997  
ISSN: 0010-4841 LANGUAGE: English RECORD TYPE: Fulltext; Abstract  
WORD COUNT: 534 LINE COUNT: 00046

ABSTRACT: The IRS is offering companies free software to help them meet federal electronic tax filing requirements, but tax software vendors want to sell similar products. Companies with more than \$50,000 in annual employment taxes must pay federal taxes electronically. as of Jul 1, 1997, and as of Jan 1, 1999, companies with employment tax deposits exceeding \$20,000 have to make electronic payments . The American Payroll Association pressured the IRS to hire NationsBank and First Chicago NBD to develop free software, which can be ordered from the IRS via a toll-free telephone number. Bottomline Technology's CertiSoft Solutions subsidiary developed the \$5,995 EPIC-Enterprise EDI module that compiles data in Automated Clearing House (ACH) files for quarterly IRS filings. EPIC-Enterprise will be bundled in JD Edwards' financial application, and it also works with financial software from SAP, Oracle and ...

13/3,K/4 (Item 3 from file: 148)  
DIALOG(R)File 148:Gale Group Trade & Industry DB  
(c)1999 The Gale Group. All rts. reserv.

07794753 SUPPLIER NUMBER: 16762631 (USE FORMAT 7 OR 9 FOR FULL TEXT)  
**Electronic tax filing: how is it working?**

Srinivasan, S.; Walter, Richard M.  
National Public Accountant v40, n4, p22(5)  
April, 1995  
ISSN: 0027-9978 LANGUAGE: ENGLISH RECORD TYPE: FULLTEXT; ABSTRACT  
WORD COUNT: 2921 LINE COUNT: 00249

... software companies work with the IRS to develop the software needed to file under the EDI system.

Summary

The primary selling point of the current **electronic filing** system has been fast **refunds**. This selling point has not appealed to the typical individual **tax** client of accounting firms. Each firm should assess the costs and benefits associated with the adoption of **electronic filing**. In order to **gather information** about EFS and the procedures involved in participating in the program, **tax** practitioners should obtain Publication 1345 from the IRS. Additionally, the IRS provides free EFS informational seminars through its district offices.

The IRS is in the...

13/3,K/5 (Item 1 from file: 15)  
DIALOG(R)File 15:ABI/INFORM(R)  
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01594709 02-45698  
**Tax Executives Institute-Federation of Tax Administrators liaison meeting**  
Anonymous  
Tax Executive v50n1 PP: 59-64 Jan/Feb 1998  
ISSN: 0040-0025 JRNL CODE: TXE  
WORD COUNT: 5085

...TEXT: FTA project.

VI. State's Perspective on Simplified Tax and Wage Repo:

To new, but interesting.

Mr. Cherecwich inquired about the States' views on the **State and Wage Reporting System (STAWRS)**. Mr. Duncan explained that initial interest was in creating a system for a single point of entry for all W-2 wage and **tax** payroll information. The IRS determined that it will not divert its own resources to create the system. Likewise, the Social Security Administration, he said, would require reimbursement from the States for creating a system to **collect** and disseminate the **data**. The States, he explained, are disinclined to pay for a single-point filing system unless that system generates the information the States need in precisely...  
... States. Mr. Murphy inquired whether the single-point of filing for all W-2 information remains a goal for the States. Mr. Duncan replied that **electronic filing** of all **payroll**-related information at a single processing point is ultimately the most efficient means of **collecting**, **processing**, and disseminating the **information**. As a result, the States would like to see such a system established.

Mr. Fuchs inquired whether TEI would support a mandate requiring all worker

...

13/3,K/6 (Item 2 from file: 15)  
DIALOG(R)File 15:ABI/INFORM(R)  
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01366747 00-17734  
**Commissioner calls on more CPAs to file electronically**  
Anonymous  
Journal of Accountancy v183n2 PP: 23-24 Feb 1997  
ISSN: 0021-8448 JRNL CODE: JAC  
WORD COUNT: 502

...TEXT: also said that last year over 10 million taxpayers had refunds

deposited in their bank accounts and she suggested more businesses promote the direct deposit refunds.

(Graph Omitted)

Captioned as: **Taxes States Collect**

More **information** on the various IRS **electronic payment** and **filing** systems is available on the IRS World Wide Web site at <http://www.irs.ustreas.gov>.

13/3,K/7 (Item 3 from file: 15)

DIALOG(R)File 15:ABI/INFORM(R)

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00488660

90-14417

**Many Happy Returns**

Bryan, Marvin

Personal Computing v14n3 PP: 103-110 Mar 20, 1990

ISSN: 0192-5490 JRNL CODE: PSC

**ABSTRACT:** **Tax** software for personal income **tax** returns should incorporate the expertise of a **tax** specialist and identify allowable deductions. These programs also should help organize a return and **assemble information** and help with financial planning by demonstrating the consequences of different personal and business decisions. Seven **tax** return programs were evaluated with the help of Arvai and Associates, an accounting firm that specializes in **tax** matters. **Tax** returns were created for 2 mythical families with different problems. All programs perform math, and many provide explanatory information for each line of the return...

...a format approved by the Internal Revenue Service. If a laser printer is available, many may produce replicas of official federal returns. Some packages support **electronic filing** and can **electronically** deposit a **refund** into a bank account. Support is available for **tax** programs, but from programmers, not **tax** preparers. ...

?d

File 351:DERWENT WPI 1963-1999/UD=9934;UP=9934;UM=9934

(c)1999 Derwent Info Ltd

File 347:JAPIO Oct 1976-1999/Apr. (UPDATED 990812)

(c) 1999 JPO & JAPIO

File 344:Chinese Patents ABS Apr 1985-1999/Aug

(c) 1999 European Patent Office

?ds

Set	Items	Description
S1	60	(TAX OR TAXES) (15N) (FILING OR FILE? ? OR REPORT?)
S2	21	(TAX OR TAXES) (15N) (PREPAR? OR (FILL???) IN OR COMPLET?) (3-N) FORM? ?)
S3	965089	COLLECT? OR GATHER? OR COMPIL? OR ASSEMB?
S4	1865353	INFORMATION OR DATA OR (BANK? ? OR BROKERAGE? OR INTEREST - OR FINANCIAL OR MORTGAGE OR PAYROLL OR EMPLOYER) (3N) STATEMENT?
S5	180	(MULTIPLE OR MANY OR DIVERSE OR PLURAL? OR MUTUAL() FUND? OR INVESTMENT?) (5N) STATEMENT? OR FORM? ?(5N) (W2 OR W()2 OR 1099 OR 1098)
S6	20	CHARIT?(5N) (CONTRIBUTION? OR RECEIPT? OR DONATION?)
S7	1865492	S4 OR S5 OR S6
S8	3189	EFT OR EFTS OR ELECTRONIC?(1N) FUNDS (1N) TRANSFER? OR (ELECTRONIC OR E OR DIGITAL OR VIRTUAL) () (CASH OR MONEY ) OR ECASH OR EMONEY OR EPAYMENT?
S9	754	(PAY? OR REFUND?) (15N) (ELECTRONIC? OR ONLINE OR ON()LINE OR INTERNET)
S10	3817	S8 OR S9
S11	1	S1 AND S2 AND S3(S)S7 AND S10
S12	2	(S1 OR S2) AND S3(S)S7 AND S10
S13	1	S12 NOT S11
S14	868	TAX OR TAXES
S15	3437623	PROCESS? OR FILING OR FILE? ? OR REPORT? OR PREPAR? OR (FILE???) IN OR COMPLET?) (5N) (FORM? ? OR RETURN?)
S16	185	S14(20N)S15
S17	2	S16 AND S3(10N)S7 AND S10
S18	1	S17 NOT (S11 OR S13)

11/7/1 (Item 1 from file: 351)

DIALOG(R) File 351:DERWENT WPI  
(c)1999 Derwent Info Ltd. All rts. reserv.

009406962 \*\*Image available\*\*

WPI Acc No: 93-100472/199312

**Electronic data processing system for preparation of electronically filed tax returns - has data processing program for preparation of tax returns, electronic filing tax return with tax authority and creating deposit-loan account at authorised financial institution**

Patent Assignee: BENEFICIAL FRANCHISE CO INC (BENE-N)

Inventor: LONGFIELD R N

Number of Countries: 001 Number of Patents: 001

Patent Family:

Patent No	Kind	Date	Applicant	No	Kind	Date	Main IPC	Week
US 5193057	A	19930309	US 88146324	A	19880120	G06F-015/30	199312	B
			US 89384654	A	19890725			
			US 90615903	A	19901120			

Priority Applications (No Type Date): US 88146324 A 19880120; US 89384654 A 19890725; US 90615903 A 19901120

Patent Details:

Patent	Kind	Lan	Pg	Filing Notes	Application	Patent
US 5193057	A	31	Cont of		US 88146324	
			Cont of		US 89384654	
			Cont of			US 4890228

Abstract (Basic): US 5193057 A

The electronic **data** processing system includes electronic **data** processing programs provided for creating an electronic **tax** return that is **filed** with a **tax collecting** authority. At the same time as the electronic **tax** return is created, a loan application is processed to create an electronic deposit/loan account for the **tax filer** at an authorised credit institution. As early as the day after completion of the **tax** return and loan application, the **tax filer** receives initial refund payment from the loan account.

The authorised credit institution electronically **files** the electronic **tax** return with the **tax collecting** authority which processes the return and transfers by **electronic** fund transfer the **refund** amount to the deposit/loan account at the authorised credit institution. Any refund in excess of the initial refund payment is then forwarded to the **tax filer**. Provision is also made for checking the credit worthiness of the **tax filer**.

USE/ADVANTAGE - Authorisation and **payment** of **refunds** based on data supplied in **electronically filed tax** returns, reduces time from **filing** to receipt of **refund** to approx. single day.

Dwg.1/29

Derwent Class: T01; T05

International Patent Class (Main): G06F-015/30

13/7/1 (Item 1 from file: 351)

DIALOG(R) File 351:DERWENT CPI  
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008172214

WPI Acc No: 90-059215/199008

Electronic income tax refund early payment system - uses data processing programs for creating electronic tax return filed with collecting authority

Patent Assignee: BENEFICIAL MANAGEME (BENE-N)

Number of Countries: 001 Number of Patents: 001

Patent Family:

Patent No	Kind	Date	Applicat No	Kind	Date	Main IPC	Week
US 4890228	A	19891226	US 88146324	A	19880121		199008 B

Priority Applications (No Type Date): US 88146324 A 19880121

Patent Details:

Patent	Kind	Lan	Pg	Filing Notes	Application	Patent
US 4890228	A		6			

Abstract (Basic): US 4890228 A

Electronic data processing programs are provided for creating an electronic tax return that is filed with a tax collecting authority. At the same time as the electronic tax return is created a loan application is processed to create an electronic deposit/loan account for the tax filer at an authorised credit institution. As early as the day after completion of the tax return and loan application, the tax filer receives initial refund payment from the loan account.

The authorised credit institution electronically files the electronic tax return with the tax collecting authority which processes the return and transfers by electronic fund transfer the refund amount to the deposit/loan account at the authorised credit institution. Any refund in excess of the initial refund payment is then forwarded to the tax filer. Provision is also made for checking the credit worthiness of the tax filer.

ADVANTAGE - Shortening time from filing to receipt of refund to as little as one day.

Dwg.1/1

Derwent Class: T01

International Patent Class (Additional): G06F-015/21

18/7/1 (Item 1 from file: 344)  
DIALOG(R)File 344:Chinese Patents ABS  
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4123951

INVOICE DATA COLLECTING AND PROCESSING SYSTEM AND INVOICE CHECKING METHOD

Patent Assignee: WANG SHIJIU (CN)

Author (Inventor): SHIJIU WANG (CN)

Number of Patents: 001

Patent Family:

CC	Number	Kind	Date
CN	1153952	A	970709 (Basic)

Application Data:

CC	Number	Kind	Date
*CN	96122984	A	961113

Abstract: The invoice data collecting and processing system consists of the tree computer network of taxation departments and the electronic invoice data memory of tax payers. The invoice checking method is that the invoice data memory is delivered by tax payer to taxation department, where the invoice data are read out and checked by the tax computer.

?

Set	Items	Description
S1	161	(TAX OR TAXES) (15N) (FILING OR FILE? ? OR REPORT?)
S2	112	(TAX OR TAXES) (15N) (PREPAR? OR (FILL???) IN OR COMPLET?) (3-N) FORM? ?)
S3	227670	COLLECT? OR GATHER? OR COMPIL? OR ASSEMB?
S4	188371	INFORMATION OR DATA OR (BANK? ? OR BROKERAGE? OR INTEREST - OR FINANCIAL OR MORTGAGE OR PAYROLL OR EMPLOYER) (3N) STATEMENT?
S5	390	(MULTIPLE OR MANY OR DIVERSE OR PLURAL? OR MUTUAL() FUND? OR INVESTMENT?) (5N) STATEMENT? OR FORM? ?(5N) (W2 OR W()2 OR 1099 OR 1098)
S6	7	CHARIT?(5N) (CONTRIBUTION? OR RECEIPT? OR DONATION?)
S7	188528	S4 OR S5 OR S6
S8	505	EFT OR EFTS OR ELECTRONIC?(1N) FUNDS (1N) TRANSFER? OR (ELECTRONIC OR E OR DIGITAL OR VIRTUAL) () (CASH OR MONEY ) OR ECASH OR EMONEY OR EPAYMENT?
S9	601	(PAY? OR REFUND?) (15N) (ELECTRONIC? OR ONLINE OR ON()LINE OR INTERNET)
S10	0	INLAND()REVENUE?(15N) (FILING OR FILE? ? OR REPORT?)
S11	0	INLAND()REVENUE?(15N) (PREPAR? OR (FILL???) IN OR COMPLET?) - (3N) (FORM? ? OR RETURN?))
S12	0	S1(S)S2(S)S3(10N)S7(S) (S8 OR S9)
S13	0	(S1 OR S2) (S)S3(10N)S7(S) (S8 OR S9)
S14	2	(S1 OR S2) (S)S3(5N)S7
S15	113	(TAX OR TAXES) (15N) (PREPAR? OR (FILL???) IN OR COMPLET?) (3-N) (FORM? ? OR RETURN? ? OR DOCUMENT?))
S16	2	(S1 OR S15) (S)S3(5N)S7
S17	6	(S1 OR S15) (S) (S8 OR S9 OR ELECTRONIC() (WALLET OR PURSE) )
S18	6	S17 NOT S16
S19	3	S18 NOT FLUID?
S20	130	AU=MILLER DAVID?
S21	0	S20 AND (TAXES OR TAX)

14/3,K/1 (Item 1 from file: 348)

DIALOG(R)File 348:European Patents

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01029384

ORDER fax of complete patent from Dialog SourceOne. See HELP ORDER 348

**Distributed network based electronic wallet**

**Verteilte netzwerk basierte elektronische Geldbörse**

**Portemonnaie électronique repartie base sur un réseau**

PATENT ASSIGNEE:

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PATENT (CC, No, Kind, Date): EP 917119 A2 990519 (Basic)

APPLICATION (CC, No, Date): EP 98203747 981109;

PRIORITY (CC, No, Date): US 65291 P 971112; US 81748 P 980414

DESIGNATED STATES: AT; BE; CH; CY; DE; DK; ES; FI; FR; GB; GR; IE; IT; LI;  
LU; MC; NL; PT; SE

INTERNATIONAL PATENT CLASS: G07F-019/00; G06F-017/60;

ABSTRACT WORD COUNT: 161

LANGUAGE (Publication, Procedural, Application): English; English; English

FULLTEXT AVAILABILITY:

Available Text	Language	Update	Word Count
CLAIMS A	(English)	9920	683
SPEC A	(English)	9920	8988
Total word count - document A		9671	
Total word count - document B		0	
Total word count - documents A + B		9671	

ORDER fax of complete patent from Dialog SourceOne. See HELP ORDER 348

...SPECIFICATION merchants such as tax specialists, loan brokers, financial planners, and similar entities, which typically use information provided by a consumer. After retrieving the consumer's **information**, these entities may generate **compilations** and/or analysis of the consumer's data and, for example, **prepare** a **tax** return, loan application or financial plan for the consumer. The service provider could then either return the **prepared** document to the consumer or directly **file** documents such as a **tax** returns if authorized to do so by the consumer. Resulting information might also be incorporated into the consumer's information stored in the Information Bank...

14/3,K/2 (Item 2 from file: 348)

DIALOG(R)File 348:European Patents

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00738202

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**A customer data processing system provided in a showroom**

**Datenverarbeitungssystem fur Kunden in einem Ausstellungsraum**

**Système de traitement de données pour clients dans une salle d'exposition**

PATENT ASSIGNEE:

FUJITSU LIMITED, (211460), 1015, Kamikodanaka, Nakahara-ku, Kawasaki-shi,

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INVENTOR:

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Kawasaki-shi, Kanagawa 211, (JP)  
Sakai, Satomi, c/o Fujitsu Limited, 1015, Kamikodanaka, Nakahara-ku,  
Kawasaki-shi, Kanagawa 211, (JP)

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PATENT (CC, No, Kind, Date): EP 696004 A1 960207 (Basic)

APPLICATION (CC, No, Date): EP 95112320 950804;

PRIORITY (CC, No, Date): JP 94184838 940805

DESIGNATED STATES: DE; FR; GB

INTERNATIONAL PATENT CLASS: G06F-017/60;

ABSTRACT WORD COUNT: 177

LANGUAGE (Publication, Procedural, Application): English; English; English

FULLTEXT AVAILABILITY:

Available Text	Language	Update	Word Count
CLAIMS A	(English)	EPAB96	1109
SPEC A	(English)	EPAB96	6290
Total word count - document A			7399
Total word count - document B			0
Total word count - documents A + B			7399

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...SPECIFICATION from the salesman to the customer.

Further, in the above estimating processes, since the standard assessed price for the trade-in car and the weight **tax** and the consumer **tax** are automatically calculated by searching the **file** and the total price are also automatically calculated based on the estimation, it is possible to prevent calculation errors and descriptive errors. Further, since the estimated data are sent to the host terminal 31 and stored in the customer file 32, it is possible to **collectively** manage the estimated **data** in the host terminal 31.

Figure 11 is a process flowchart for search of the catalog. The catalog file 27 is searched based on the...

19/3,K/1 (Item 1 from file: 348)

DIALOG(R)File 348:European Patents

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00950644

ORDER fax of complete patent from Dialog SourceOne. See HELP ORDER 348  
**Electronic cash register with special sales information management**  
**Elektronische Registrierkasse mit spezieller Verkaufsdatenverwaltung**  
**Caisse enregistreuse electronique avec gestion de donnees de ventes**  
**speciales**

PATENT ASSIGNEE:

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INVENTOR:

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PATENT (CC, No, Kind, Date): EP 862154 A2 980902 (Basic)

APPLICATION (CC, No, Date): EP 98301035 980212;

PRIORITY (CC, No, Date): JP 9728104 970212

DESIGNATED STATES: AT; BE; CH; DE; DK; ES; FI; FR; GB; GR; IE; IT; LI; LU;  
MC; NL; PT; ŠE

INTERNATIONAL PATENT CLASS: G07G-001/12;

ABSTRACT WORD COUNT: 154

LANGUAGE (Publication,Procedural,Application): English; English; English

FULLTEXT AVAILABILITY:

Available Text	Language	Update	Word Count
CLAIMS A	(English)	9836	455
SPEC A	(English)	9836	7287
Total word count - document A			7742
Total word count - document B			0
Total word count - documents A + B			7742

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...SPECIFICATION unit prices are associated with each other, a unit price corresponding to the entered product identification code is read and registered.

One such prior art **electronic cash register** is disclosed, for example, in Japanese Unexamined Patent Publication JP-A 2-239397 (1990). The cash register disclosed therein is designed to calculate **tax** amounts. More specifically, it provides a category-specific **file** that stores a type of **tax** common to all items of merchandise and that has a tax type area for storing tax types associated with category codes for categorizing all items...

...area. In executing a registration process, if the tax type associated with the category code of the product to be registered is set in the **tax** type area of the category-specific **file**, the registration process is performed using that **tax** type in the **tax** type area of the category-specific **file**; if the **tax** type is not set, the registration process is performed using the common **tax** type.

Apart from the category-specific **file**, the above-mentioned cash register provides a product-specific file that stores the category code to which the product belongs corresponding to one of product...

19/3,K/2 (Item 2 from file: 348)

DIALOG(R)File 348:European Patents

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00888973

ORDER fax of complete patent from Dialog SourceOne. See HELP ORDER 348  
**A mechanism for enabling secure electronic transactions on the open internet**

Mechanismus, der gesicherte elektronische Transaktionen auf dem  
öffentlichen Internet ermöglicht

Mecanisme permettant des transactions électroniques sécurisées sur Internet

PATENT ASSIGNEE:

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LEGAL REPRESENTATIVE:

R.A. KUHNEN & P.A. WACKER (101501), Patentanwaltsgesellschaft mbH

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PATENT (CC, No, Kind, Date): EP 813325 A2 971217 (Basic)

APPLICATION (CC, No, Date): EP 97109412 970610;

PRIORITY (CC, No, Date): US 664019 960612

DESIGNATED STATES: AT; BE; CH; DE; DK; ES; FI; FR; GB; GR; IE; IT; LI; LU;  
MC; NL; PT; SE

INTERNATIONAL PATENT CLASS: H04L-029/06;

ABSTRACT WORD COUNT: 159

LANGUAGE (Publication,Procedural,Application): English; English; English

FULLTEXT AVAILABILITY:

Available Text	Language	Update	Word Count
CLAIMS A	(English)	9712W2	955
SPEC A	(English)	9712W2	2263
Total word count - document A			3218
Total word count - document B			0
Total word count - documents A + B			3218

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...SPECIFICATION of security at least equivalent to the security provided by a conventional telephone and preferably to the level of security provided by proprietary home banking, **tax filing**, or bill paying communication systems. A system employing a proprietary protocol to transmit data over the telephone system is advantageous because consumers by and large...

...sensitive data in this manner (by speaking or faxing the data, for example) is secure. Support for this belief is provided by the success of **on-line banking, tax filing** and **bill paying** systems.

It should be noted that the term "isolated" as used herein refers to isolation with respect to information transport and not physical isolation. For...

19/3,K/3 (Item 3 from file: 348)

DIALOG(R)File 348:European Patents

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00524266

ORDER fax of complete patent from Dialog SourceOne. See HELP ORDER 348

**Electronic cash register**

**Elektronische Registrierkasse**

**Caisse enregistreuse électronique**

PATENT ASSIGNEE:

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PATENT (CC, No, Kind, Date): EP 527423 A2 930217 (Basic)

EP 527423 A3 960207  
EP 527423 B1 990303  
APPLICATION (CC, No, Date) [REDACTED] EP 92113277 920804;  
PRIORITY (CC, No, Date): JP 91199296 910808; JP 91259460 911007; JP 9271407  
920327  
DESIGNATED STATES: BE; DE; FR; GB; IT; NL  
INTERNATIONAL PATENT CLASS: G07G-001/12; G07G-001/14;  
ABSTRACT WORD COUNT: 193

LANGUAGE (Publication, Procedural, Application): English; English; English  
FULLTEXT AVAILABILITY:

Available Text	Language	Update	Word Count
CLAIMS B	(English)	9909	685
CLAIMS B	(German)	9909	584
CLAIMS B	(French)	9909	720
SPEC B	(English)	9909	7180
Total word count - document A			0
Total word count - document B			9169
Total word count - documents A + B			9169

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...SPECIFICATION cash register is different from that of the first embodiment in the construction of the file storage area of the RAM 24.

In the above **electronic cash** register, the RAM 24 has a file storage area R1 as shown in Fig. 8. The area R1 is divided into two half areas, that is, a storage area R2 for the article file and a storage area R3 for the auxiliary file, at the time of installation of the **electronic cash** register. The article file files article data items of dealing articles each constructed by items of an article code, article name, department, unit price, tax...

...sales amount. The auxiliary file files article data items of non-dealing articles each constructed by items of an article code, article name, department and **tax** division. In the auxiliary **file**, the department data represents a department code of an article classified in terms of the standard classification form of JICFS, the unit price data represents ...code from the auxiliary file and then effects the registration process of an article for sale in the step ST40 as described before.

When the **electronic cash** register of the second embodiment is installed in the store, the storage area R2 of the article file provided in the RAM 24 is made...

...The auxiliary file contains standard article data items of a large number of non-dealing articles, that is, article codes, article names, departments, unit prices, **tax** divisions and packed numbers which are previously classified and **filed** for different types of industry and different regions.

For example, if the operation in the registration mode is effected in this condition, data items of...

?